

Policy for the management of Outdoor Education, Visits and Off-Site Activities

1. Introduction

This policy applies to all employees and supervisors and covers all off-site visits and activities organised through the School and for which the Governing Body and Head Master are responsible.

The Governing Body seeks to ensure that every pupil has access to a wide range of educational experiences as an entitlement. As part of this entitlement the Governing Body recognises the significant educational value of visits and activities which take place away from the immediate School environment.

Visits and off-site activities support, enrich and extend the curriculum in many subject areas, encourage co-operation, teamwork and the application of problem-solving skills and develop independence and self-confidence.

Residential opportunities, physical challenge and adventure can have a particular part to play in the development of personal and social qualities for all young people. Outdoor education helps young people to be physically active and to understand how to assess and manage risk.

The management of visits and off-site activities places particular responsibilities for the health and safety and welfare of all participants on the Governing Body, Head Master and the party leader, members of staff and volunteers, pupils and parents.

The School also has responsibilities to other members of the public and to third parties. This policy on visits and off-site activities therefore complements the wider School Health and Safety Policy.

The Downside School Trip Leaders Handbook is a valuable `guide` which can be consulted whilst on Visits and trips. A copy can be found [here](#).

2. Provision of Employer Guidance

Downside School has formally adopted “**National Guidance**” as “Downside School Employer Guidance”. This Educational visits guidance can be found on the following web site: www.oeapng.info The DfE Guidance for Health and Safety in Schools is here: [DfE advice on Health and Safety](#)

It is a legal expectation that Downside School employees must work within the requirements of their employer’s guidance. Downside School employees should also follow National Guidance (NG) recommendations.

Where there is any variance of policy between the national guidance and Downside School policy the Downside School policy requirements take precedence over any guidance.

Where a Downside School employee commissions a Learning Outside the Classroom (LOtC) activity, they must ensure that the commissioned agent has either:

1. Adopted Downside School or Outdoor Education Advisers' Panel (OEAP) National Guidance

Or

2. has systems and procedures in place where the standards are not less than those required by OEAP National Guidance.

3. Scope and Remit

The NG document “[Basic Essentials MUST Read - 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: “[Underpinning Legal Framework](#)”

This Policy also relates to the following Downside School policies:

- Child Protection Policy
- Health and Safety Policy
- Emergency Plan

4. Ensuring Understanding of Basic Requirements

As an employer, Downside 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 who 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 at Downside School is the Employer Guidance web site [OEAPNG](#)

The relevant training courses for Downside School are:

- Educational Visit Coordinator (EVC) Training – Downside School is required to have a current, trained EVC in post – currently David Pollard
- Downside School Educational Visit Coordinator (EVC) revalidation - The EVC is required to undertake a formal revalidation from time to time (3 years suggested).
- 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 induction’ 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.

5. 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.

Downside School uses an internal online system for notification and approval ([eVisit](#)) for all visits.

Approval

All School visits are approved at Head Master and EVC Level. Visits and activities as part of the Combined Cadet Force (CCF) are also to be approved by the MOD Single Service Training and Safety Advisor (TSA). These trips will be recorded on the MOD Westminster database system.

- (1) Head Master approval is required for all residential visits and all adventure activities (Advice from EVC).
- (2) EVC approval is required for all day visits which are of a non-hazardous nature.
- (3) Sport fixtures and trips as part of the Downside weekend activities programme are approved by the Directors of Sport and Wider Curriculum respectively.

The approval process and procedures for day, adventurous and residential visits are set out at Appendix A – Trip Approval Flowchart.

All School trips have a named leader who must be a current member of staff at Downside School. The approval paperwork is to be completed by the relevant trip leader. 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.

6. Risk Management

Refer to National Guidance document: [“Risk Management”](#)

As an employer, Downside School has a legal duty to ensure that risks are managed - requiring them to be reduced to an “acceptable” or “tolerable” level. This requires that proportional (suitable and sufficient) risk management systems are in place. Not least Downside School is to provide such support, training and resources to its employees as is necessary to competently be able to identify and document risks.

The risk management of an activity should be informed by the benefits to be gained from participating. Downside School 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”. The 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. DfE also makes it clear that they support this approach through their guidance in [“Health and Safety: advice for schools”](#).

There is no legal or Downside 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. HSE case study examples of sensible school trip risk management are available on the HSE website.

Generic Downside School risk management plans exist for a wide range of trips and components of trips – accommodation, transport, routine visits etc. These are available on the I Drive in the School Safety Management System folder.

7. 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, Downside School is committed to providing emergency planning procedures to support trip leaders or other staff in the event of a critical incident.

Further guidance can be found at National Guidance Sect 4.1c [“Critical Incident Management for Visits”](#) and the [Downside School Emergency Plan](#)

All Downside School trip leaders are provided with a Critical Incident card detailing our emergency procedures and contact details for the Critical Incident team.

All residential trips have a nominated Critical Incident base contact who has full trip details and is 'on call' at all times.

8. Monitoring

As an employer, Downside School ensures that there is monitoring of the 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.

Further details are available at the NG Section 3.2b document: [“Monitoring”](#)

9. Assessment of Leader Competence

Employer Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of the Downside 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.

All staff involved in off-site activities complete a 'Certification of Competence' form where experienced staff comment on their role in previous trips and based on their experience. The EVC decides which of four levels (assist, lead day, lead residential, lead residential overseas) the member of staff can operate at. A database detailing which staff are authorised to lead trips at the various levels can be found on the School I drive under the EVC Folder.

All approved Trip Leaders are added as a 'Trip Leader' on the eVisit trip approval software.

Where appropriate to be 'competent' also includes completing specific First Aid and Minibus driving qualifications.

Adventurous Activities – see appendix A for list

Downside School 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 AALS licence. Staff who are planning to lead Adventurous trips are to have their qualifications / experience endorsed by the EVC – This is to be completed by submitting a request through the eVisit / my Profile function.

Other Areas

Staff competence in first aid, minibus driving, lifesaving 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.

Further guidance is given in National Guidance Section 3.2d & 4.4a [“Assessment of Competence”](#)

10. Role-specific Requirements and Recommendations

OEAP National Guidance sets out clear and detailed responsibilities and functions of specific responsibilities that relate to roles within Downside School. These are:

- [Governing Body \(Employers\)](#)
- [Head](#)
- [EVC](#)
- [Visit or Activity Leader](#)
- [Assistant Visit leader](#)
- [Parents](#)

All staff are to ensure that they clearly understand these responsibilities, for further guidance refer to the OEAP National Guidance document on Role and responsibilities.

11. Charges for Off-site Activities and Visits

Downside School has the following ‘code’ for charging for visits:

- If the trip is compulsory in School time and required for the scheme of work then 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. If these costs are to be added to the School Bill, then parental permission will be required for all charges over £30.00.
- For overseas trips and UK residential visits trip leaders are to ensure that parents are made fully aware of the financial details of the trip. This is to include terms of payment, cancellation options and the School’s charging policy. Advice is to be sought by leaders in the early planning stages from the School Bursary for all aspects of the financial elements of the trip (accounting, banking and reporting).

12. Vetting and DBS Checks - see also Downside School’s [Child Protection Policy](#).

Downside employees or volunteers who work frequently or intensively with, or have regular access to young people or vulnerable adults, must undergo an enhanced DBS 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.

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”](#)

13. 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.

Further guidance can be found at National Guidance Sect 4.3b [“Ratios and Effective Supervision”](#) and Section 4.2a [“Group management and Supervision”](#)

14. 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. 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 Downside School staff, eg a new Duke of Edinburgh Award walk.

Residential trips, visits abroad, exchange visits or adventure activities led by school staff all have aspects of complexity. If the visit is led and managed by a Third Party Provider, then a variety of approaches can reduce the need for a 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
- School Travel Forum

National Governing Body centre approval schemes (applicable where the provision is a single, specialist activity).

Downside School takes the view that where a provider holds one of the above accreditations or one of equal standing, there should be no need to seek further assurances. Safeguarding concerns however will still need to be addressed.

Refer to: NG document "[Preliminary Visits and provider Assurances](#)"

15. Insurance for Off-site Activities and Visits

Employer's Liability Insurance is a statutory requirement and Downside School has 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. Downside School also holds Public Liability insurance, which will indemnify the school against all claims for compensation for bodily injury from persons not in its employment, as well as for the accidental loss of, or damage caused to, third party property where Downside Staff 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 Downside School may be considered responsible.

The School also holds comprehensive travel insurance for staff and pupils. Details of the Policy are available to trip leaders and sent to parents as part of pre-trip administration.

Further guidance can be found at National Guidance Section 4.4c "[Insurance](#)"

16. Inclusion

Every effort should be made to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of sex, disability, race, religion and belief, colour, sexual orientation, gender reassignment, nationality, age, ethnic or national origin, marriage or civil partnership, pregnancy or maternity. special educational or medical needs, in accordance with the 'Equality Act 2010'. 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.

Trip organisers / leaders should take all *reasonably practicable* measures to include all young people. The principles of inclusion should be promoted and addressed for all visits which will help ensure 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 within Downside School 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.

Further guidance can be found at National Guidance Section [“Inclusion”](#)

17. Good practice requirements

To be deemed competent, a Downside 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.

Employer Guidance sets a clear standard to which Downside 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 School should view the original documents and certificates when verifying leader’s qualifications, and not rely on photocopies.

Where a member of staff or volunteer is a parent (or otherwise in a close relationship to 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”](#)

18. Medical

Medical details for all students and staff taking part in trips are to be collected by the trip leader prior to all trips. For sporting fixtures or non-adventurous this can be completed by reference to the school 3 Sys database. For all other trips the Annual Parental Consent Form is also to be checked. The School nurse is also to be consulted for all residential trips.

Any specific student medical issues are to be included in the trip risk management planning.

It is a requirement that all offsite trips and visits have adequate First Aid provision. For all adventurous activities and residential trips this includes the requirement for qualified and in date First Aid cover along with a fully stocked First Aid Kit, available from the Health Centre.

Information to assist Trip Leaders can be found at National Guidance [“Good Practice”](#)

19. 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.

Information to assist Trip Leaders can be found at National Guidance [“Good Practice”](#)

Minibuses

It is a requirement of Downside School that all staff must who wish to drive a school minibus are approved to do so. A list of staff approved can be found on the I Drive under the “approval to drive” Folder.

The level of supervision necessary when transporting students in a minibus 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.

Further guidance can be found in National Guidance Sect 6g [“Transport in Minibuses”](#)

Other modes of transport

The visit Leader should ensure that coaches or buses are only hired from an approved provider. Details of companies approved by Downside School can be found on the I Drive (EVC / Approved Transport Providers).

Transporting young people in private cars requires careful consideration. If private cars are to be used to enable an offsite school visit then prior approval is to be sought from Downside School Transport Co-ordinator. If approved, details are to be recorded on the School I Drive (approval of drivers) Spreadsheet.

Further guidance can be found at National Guidance Sect 6f [“Use of Private Cars”](#)

20. Planning

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

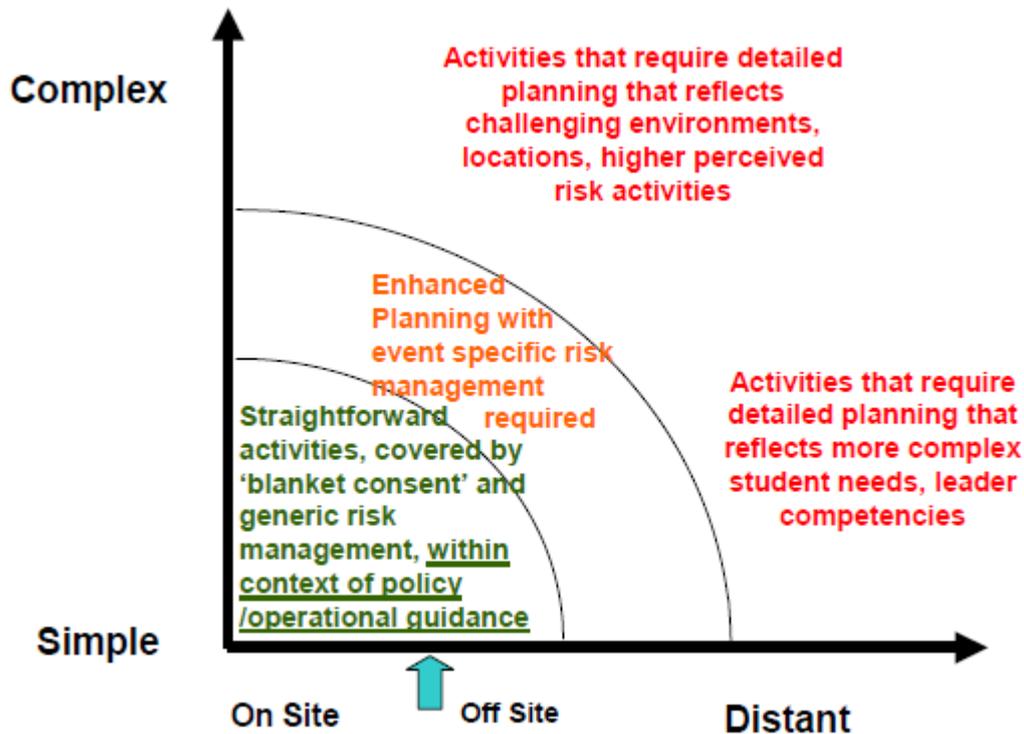
- The plan is based on relevant Downside School procedures and employer guidance.
- All staff (including any adult volunteer helpers) and the young people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk management process.
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained. Parents or those with parental responsibility are to be given a clear opportunity to withdraw their consent for any activity which consist of an adventurous or hazardous element.
- 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.

- **S**taffing requirements – Trained? Experienced? Competent? Authorised? 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?



Further guidance can be found at National Guidance Sect 5.2b [“Planning Basics for Outdoor Learning, Off Site Visits & Learning Outside the Classroom”](#)

Examples of Downside trips

Straightforward – Sporting Fixtures, local theatre, local museum, House or Tutor Group meal out, Social Trips as part of the Weekend Activities Programme

Enhanced Planning – Residential Trips, Geography fieldwork or Adventurous activities

Challenging Environments – D of E Gold level Expeditions

Complex student needs leader competencies – Water sports or Overseas Trips

21. Consent

At the start of each Academic year each parent / guardian is expected to complete an [Annual Trip Consent Form](#). The personal and medical information requested is to ensure that a proper duty of care is possible for all Off-Site Visits during that academic year, including activities which extend beyond the normal School day, overnight trips or residential stays, activities or trips during holiday periods, adventurous activities, visits outside the UK, all activities involving remote supervision or where supervision will be exercised by an external provider, activities for which a higher than normal risk and all off-site sporting activities.

For visits or activities that are **residential, involve hazardous activities, would incur a substantial financial cost or are not within the local area**, parents are to be informed in advance, in writing. Details to be included in each `trip letter` for your consideration would include the following information:

Date and times of visit, travel arrangements, who the nominated trip leader is, contact details for the group, the cost, if any for the trip, insurance arrangements, detailed itinerary (any hazardous activities will be listed) option to withdraw consent for the trip (or part of ie certain activities).

Parents are to be given a clear understanding that they may withdraw consent for any specific visit or activity offered by the school. Parents should also be `invited` to update any of the information included in the Annual Trip Consent Form – ie Medical or emergency contact detail.

Examples of Parental Information letters can be found on the I Drive / EVC Folder A copy of the parental trip letter is to be included in the eVisit electronic application process.

For planning purposes, parents may still be asked to acknowledge whether their child will be attending a trip or visit and that they understand the financial implications of applying for a trip. In most cases this can be done by email or a simple consent form. An example can be found on the I Drive / EVC Folder

Note:

For all trips costing £30.00 or more then parental permission to add charges to school bills should be obtained in advance.

Authorised by	SLT
Date	28.11.2017

Effective date of the policy	5.12.2017
Circulation	Governors / all staff / [volunteers] automatically Parents on request Published on the School's website

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 / Rafting or improvised rafting
- Sailing / windsurfing / kite surfing
- 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 / Coasteering /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
- 'Extreme' sports (Parcours, Bungee, Zorbing, Mountain or ATB Boarding etc.)
- Other activities (e.g. initiative exercises) involving skills/risks inherent in any of the above