

**FOREST OAK SCHOOL  
and  
MERSTONE SCHOOL**



# Educational Visits and Learning Outside the Classroom Policy



Reviewed: September 2023

Adopted by Governors: September 2023

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## 1. Who and what this policy is for?

Every year children and young people from Solihull Metropolitan Borough Council (SMBC) schools, participate in educational visits, off-site activities, adventurous activities and Learning Outside the Classroom (LOtC). SMBC recognises the important role these activities play in providing a rich and rewarding educational experience that supports the personal development of children and young people whatever their age, ability, or circumstances.

This policy applies to the activities outlined above, taking place within or outside of normal working hours, including weekends and holiday periods. Activities undertaken by children and young people under the supervision or control of direct SMBC employees or pastoral, which are facilitated by SMBC. This includes all maintained schools.

Other schools including academies, foundation and voluntary aided schools can use this policy for reference and as a basis for their own employer policy and procedures. These schools are strongly advised to follow the content of this policy as best practice guidance.

Educational visits and LOtC provide opportunities which are integral to a rounded educational experience, which excites challenges, motivates, and stimulates learners, enabling young people to discover the world. SMBC actively supports and encourages such activities. In so doing, SMBC recognises this may involve exposing participants to challenges and risks with which they may not be familiar.

This policy aims to support maintained schools to put arrangements and procedures in place, including health and safety requirements, to identify and manage these risks, reducing them to an acceptable or tolerable level, ensuring a balancing of the risks against the benefits of the activity.

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## 2. Organisational Responsibilities and Arrangements

### 2.1 Outdoor Education Advisors Panel National Guidance (OEAP)

SMBC has formally adopted the “Outdoor Education Advisors Panel National Guidance (OEAP)” as the source guidance for this policy, which can be accessed here [OEAP](#). It is a legal expectation that employees must work within the requirements of their employer’s guidance; therefore, SMBC employees in maintained school must follow and adhere to the requirements of “OEAP National Guidance” (NG), as well as the requirements of their own team policy.

Please see further guidance on writing an establishment policy for outdoor learning: [Guidance on Writing an Establishment Policy for Outdoor Learning, Off-Site Visits and Learning Outside of the Classroom](#)

The OEAP National Guidance is a source of good practice for managing and delivering outdoor learning and off-site visits and a place to seek information on the application of relevant legislation.

In addition to guidance on policies, procedures and general risk management, model forms and checklists are included to assist schools with the effective planning of trips and visits. **Maintained schools must follow the OEAP National Guidance to demonstrate that reasonable steps are being taken to manage risks.**

As part of meeting these standards-maintained schools must ensure they have an emergency plan in place for outdoor educational visits and off-site activities. Emergency procedures should be developed by following Emergency Planning Guidance contained within the [CSW Resilience Team](#)

- [School support web pages.](#)

The Health and Safety Executive and Department for Education have also published educational visits guidance on their websites that must be followed. The relevant information and guidance can be accessed here:

[DfE guidance on health and safety on educational visits](#) [HSE guidance for School](#)

[Trips](#)

[OEAP Basic Essentials when](#)

[planning a visit](#) [Early-years-foundation-stage-framework-2](#)

Schools with children in the Early Years Foundation Stage should refer to the Early Years Foundation Stage Statutory Framework for minimum adult/child ratios. Schools should consider the needs of the children and the context of the trip and increasing ratios as required, with statutory requirement as a minimum.

## 2.2 The SMBC LOtC Reporting System

It is a SMBC requirement that maintained schools record all their visits including local, overseas, residential, and adventurous activity visits on the approved reporting system. This system is currently e-Visit

E-Visit is designed to support the planning, management and local approval of educational visits, trips, and extra-curricular activities and can be accessed [here](#)

The reporting and recording of visits will ensure SMBC is aware of all visits being undertaken, enabling support to be provided where necessary and to assist in an emergency or to deal with media enquiries etc.

The E-Visit LOtC management system is available to maintained schools.

When recording trips on the E-visit system 'visit specific' a risk assessment must be included, which covers those risks not covered by a provider's generic risk assessment such as travelling to and from the venue, general safeguarding arrangements of pupils, medical and health issues,

procedures in the event of an emergency. Missing child etc. The risk assessment can be added to the visit form located in e-Visit.

**Note: Maintained schools are responsible for ensuring that a suitable and sufficient risk assessment is in place prior to undertaking any educational visits, trips, and extra-curricular activities. The assessment must be undertaken by a competent person who has sufficient knowledge, information, training, and experience.**

## 2.3 Notification and Approval of Educational Visits and Trips

SMBC has delegated the formal approval of all visits and trips to Managers, Headteachers and Governing bodies.

It is important that maintained schools ensure that an alternative designated senior leader is appointed to carry out the formal approval of trips and visits and there is a clear process in place understood by all relevant staff.

## 2.4 Emergency Planning, Critical Incident Support, and Incident Reporting

A critical incident may include 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
- has gone missing for a significant and unacceptable period

**Safeguarding:** When any concerns about a young person are identified these should be raised with the designated safeguarding lead within the setting. When visits occur out of hours, or out of term time, adequate and appropriate cover arrangements must be in place.

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

All health and safety related accidents/incidents and near miss events, arising from activities covered by this policy must be reported to the SMBC Health, Safety Risk Support Service in line with the Incident, Accident and Near Miss Reporting Procedure. The current reporting system is [Evotix Assure](#).

It is recommended that the Evotix Assure mobile platform is accessible on handheld devices that are being taken on visits to ensure the quick and efficient reporting of any incidents.

[This is applicable to all SMBC maintained schools.](#)

**Insurance:** Each school is provided with details of cover and emergency contact details within their policy documentation.

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## 3. Requirements

### 3.1 SMBC general requirements

It is SMBC's policy, so far as is reasonably practicable, that all activities falling within the scope of this policy should:

- provide maximum assurance of safety for children and adults on educational visits.
- ensure education visits are planned as an integrated part of the school curriculum to enhance every child's learning experiences.
- comply with Outdoor Education Advisors Panel (OEAP) best practice guidance.
- manage and record educational visits on the approved on-line electronic information, management, and planning system for visits and LOTC activities.
- support schools to put arrangements, procedures, and training in place, including health and safety requirements, to identify and manage these risks, reducing them
- to an acceptable or tolerable level, ensuring a balancing of the risks against the benefits of the activity.

Where any activity that falls within the scope of this policy is being provided by a third party, then SMBC will require:

- reasonable checks of any external organisation are carried out to ensure that they are competent to provide such activities. For more information refer to: [OEAP using external providers](#)
- other accreditation schemes may help to provide reassurances about providers and reduce the need for further research or questioning. For example: 'Adventuremark', AHOEC Gold Standard and National Governing Body Centre approval schemes.
- SMBC confirms and endorses the LOtC Quality Badge Scheme. For details of the badge scheme and to check a provider's accreditation status go to: [OEAP Quality Badge](#)
- the performance of external organisations is adequately monitored to ensure that agreed practices are being met.
- the significant findings of monitoring are acted upon and are reported to the school's Governing Body and SMBC where appropriate.

### 3.2 Forest Oak and Merstone School Requirements

At Merstone and Forest Oak schools the expectation is that prior to any visit, trip or Learning Outside the Classroom staff must ensure that:

- A minibus risk assessment for any group of children or young people is attached to the E-Visit paperwork at the start of the academic year and can be used for subsequent trips for that group of pupils.
- Any medication required is identified for the group and attached with each E-Visit visit including identifying those pupils with medical needs meaning they are more likely to require 999 assistance.
- All risks and activities at the venue are detailed on an attachment relevant to the group. No additional activities are to be undertaken.
- On the day of your visit, trip or LoTC the Trip Leader will leave in school a hard copy version of the attendee list of staff and pupils involved in the activity and the lead person contact number.
- Paperwork is to be sent by E-Visit to the EVC at least two weeks prior to the date of the visit. In exceptional circumstances agreed with the EVC this deadline may be negotiated when something unexpected is available.

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## 4. Roles and Responsibilities

### 4.1 Director of Children's Services & Skills and Education Improvement Team (SMBC)

The Director of Children's Services & Skills and the Education Improvement Team are responsible for:

- providing clear and visible leadership on the application and implementation of this policy in all SMBC Children's Services settings and schools.
- ensuring there is up-to-date employer guidance relating to off site visits, outdoor learning and LOtC that applies to all local authority provision and employees.
- providing information, advice, and guidance on LOtC teaching and learning approaches, the curriculum, educational legislation and the safeguarding of children and young people.

- allocating sufficient resources to ensure that competent advice and support is available to SMBC settings, providing activities falling within the scope of this policy.
- delegating the formal approval of all trips, educational visits, and extra-curricular activities to, Headteachers, Managers, Governing Body and designated staff.
- ensuring that the requirements of this policy are adequately monitored and that corrective actions are taken, as necessary, to obtain compliance with the requirements of this policy.
- ensuring adequate training is in place for all employees and that they understand the guidance and the process: For further information please contact [healthandsafetysupport@solihull.gov.uk](mailto:healthandsafetysupport@solihull.gov.uk) or call 0121 704 6328
- ensuring that all delegated roles, duties and responsibilities are clearly defined.
- liaising with the SMBC Health, Safety and Risk Support Service (HSRSS) on any significant health and safety issues that have been reported.
- reporting to the Corporate Health and Safety Board any concerns on the application of this policy in Children's Services settings and schools.
- working in conjunction with the HSRSS to ensure this policy and any associated guidance is kept up to date.

For further Guidance on the Director of Children's Services (DCS) or equivalent role, refer to [OEAP Guidance for Director of Services](#)

#### 4.2 School Governing Body

The Governing Body should satisfy themselves that the school has suitable policies and procedures in place to adequately manage and monitor all activities falling within the scope of this policy.

This includes the formal approval of all educational visits, trips, and extra-curricular activities.

#### 4.3 Headteachers / Managers

Headteachers and Managers are responsible for ensuring their school have a local policy in place for educational visits and trips. That any activities falling within the scope of this policy and over which they have any extent control are:

- approved within their school, recorded on the E-VISIT system (SMBC maintained schools).
- adequately resourced (planning, time, budget, and staffing) to secure compliance with the requirements of the policy and any associated procedures to enable activities to be undertaken safely and without risk to health.
- led by only trained and competent people.
- included in risk management systems, a risk assessment method to ensure that adequate risk controls are implemented to ensure the health and safety of employees and young people.
- suitable and sufficient health and safety risk assessments are undertaken by a competent person; and the findings communicated to all those affected. This includes activities provided and delivered by third parties where reasonable checks of the provider must be undertaken. For more information refer to: [OEAP Risk Management - what to record and how](#) .
- monitor any significant findings reported to the School's Governing Body so that they can maintain effective oversight of these activities.
- ensure significant health and safety risks and concerns are reported to SMBC.

The Headteacher/Manager remains responsible for the standard to be achieved in all the areas outlined above. **To assist in the planning and management of educational visits, schools that carry out educational visits and trips must appoint an Educational Visits Coordinator (EVC).** Appointment of EVC's should be in writing and should set out clearly what tasks have been delegated to them. Headteachers/Managers must monitor the performance of the EVC to ensure that the required tasks are being carried out correctly and competently.

The EVC should attend EVC training at designated intervals as part of maintaining their competence and professional development. They should be provided with the necessary information, supervision, training, time, and resources to enable them to discharge their duties effectively.

#### 4.4 Educational Visits Coordinators (EVC)

EVC's should have sufficient authority (i.e., they should normally be a senior member of staff) and time given to them to fulfil their role. The EVC should be an experienced visits leader and have the status to be able to guide the working practices of other employees.

Once appointed, EVC's have an additional responsibility to ensure that they bring any significant failings relating to compliance with this policy and its associated procedures to the attention of their Headteacher/Manager. EVC's are responsible for delivering any tasks delegated to them by their Headteacher/Manager. The OEAP website provides a suggested [EVC Checklist](#) for school/setting to follow.



#### 4.5 Training

Educational Visits Coordinator training, revalidation training and Visit Leader training courses are available through the SMBC Health, Safety and Risk Support Service. Staff will need to review their training every 3 years. For further information on course specifications and dates please contact [healthandsafetysupport@solihull.gov.uk](mailto:healthandsafetysupport@solihull.gov.uk) or call 0121 704 6328.

Target Audience	Course	Description	Duration
New and existing EVC	EVC Training	Nationally accredited training course covering aspects of the law regarding educational visits, the risk management of visits and the administrative requirements associated with off-site educational visits. The course enables EVC's to support the planning and management of their educational visits and off-site visits in line with employer requirements, national guidance, and current good practice	1 day course (Face to face)
EVC	EVC Re-validation training	The course is aimed at those who have previously undertaken the full day EVC course and been acting in the role of EVC. All current EVC's are expected to revalidate their training every 3 years.	Half day course (Face to face)
New and Experienced Visit Leaders	Visit Leader Training	The course is aimed at both new and experienced Visit Leaders and will assist employers and managers with the evidencing of staff competence to lead visits.	Half day course (Face to face)
EVC's, Headteachers, Visit Leaders, System Administrators	E-VISIT user	Course will cover the basic E-VISIT - Introduction to the system, its functions and administration	2 hours via web conferencing

## 4.6 Employees

Employees have a duty of care, are responsible for taking care of themselves and others affected by their actions or their omissions. In the context of this policy this means:

- **cooperating** with Headteachers/Managers by implementing the agreed actions of any risk management process and planning.
- **observing** wherever and whenever they undertake or are involved in activities falling within the scope of this agreed policy.
- **bringing to the attention of management** any failings in the risk management process relating to activities falling within the scope of this policy.
- it is an expectation of this policy that all SMBC employees have been **formally assessed as competent** to undertake such responsibilities as they have been assigned.

## 4.7 Health, Safety and Risk Support Service (HSRSS)

SMBC's HSRSS will provide health and safety advice and guidance on educational visits and trips: They will:

- **provide advice and guidance** to schools and settings to help promote the safe management of educational visits and trips.
- **keep up to date** on changes to health and safety legislation and guidance.
- ensure that any relevant accidents/incidents **reported** in SMBC maintained schools are submitted to the Health and Safety Executive under RIDDOR.
- carry out **periodic audits** to measure and monitor health and safety standards contained within this policy.
- work in conjunction with the maintained schools to ensure this policy and any associated guidance is kept up to date.
- provide advice and guidance on training for maintained schools and schools who have subscribed to Health and Safety services.

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## 5. Further Advice and Guidance

SMBC Children's Services settings and schools can contact the following services for further advice, guidance, and support:

Health and safety and general risk management advice & guidance:

Health, Safety Risk Support Service  
Resources Directorate  
Solihull MBC  
Tel: 0121 704 6328  
Email: [healthandsafetysupport@solihull.gov.uk](mailto:healthandsafetysupport@solihull.gov.uk)

Advice on learning outside the classroom, teaching & learning approaches, the curriculum, educational legislation and safeguarding:

Learning and Skills Service  
Children's Services & Skills Directorate  
Solihull MBC  
Tel: 0121 704 6620  
Email: [seisenquiries@solihull.gov.uk](mailto:seisenquiries@solihull.gov.uk)

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## 6. Definitions of wording in this document

**Educational Visits:** All visits with a group of young people that leave an SMBC 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 activity in schools on split sites. The activity is planned and organised by maintained schools.

**Off-site Activities:** Activities that occur away from the base of regular work with children or young people organised by employees who work within SMBC maintained schools.

**Adventure Activities:** Activities that 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 employees to lead in the activity.

**Learning Outside of the Classroom (LOtC):** Activity that takes place on the school site, and further afield. Some of this work will be covered by Educational Visits.

**Children and Young People:** All young people under the care of SMBC maintained school.

**Employees:** In the context of this policy, employees are defined as any employee of SMBC, any agency worker or volunteer working for SMBC.

Document Control:

Date of SMBC Policy: September 2021	Policy Version 2.0	Date of Next SMBC Review: September 2022
Date of SMBC Review: September 2022	Policy Version 3.0	Date of Next SMBC Review: January 2023
Original Author:	Health, Safety and Risk Support Service	
With additions and updates from:	H. Ellis, Forest Oak EVC, September 2023	