

**FOREST OAK SCHOOL**

**and**

**MERSTONE SCHOOL**



**Solihull Metropolitan Borough Council**

**Policy and Management of Visits, Trips  
and Learning Outside the Classroom**

## 1. Introduction:

Every year, thousands of children and young people from Solihull schools and Children's Services, participate in educational visits or off-site activity. This sometimes includes an adventurous 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 Solihull Metropolitan Borough Council (SMBC) will manage this aspect of learning, including health and safety requirements so that young people can discover the world beyond their classrooms and settings.

## 2. Definitions:

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 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 activity in schools on split sites. The 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 Services.

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 Children's Services & Skills, whether from a school or setting.

Staff: In the context of this policy, Staff are defined as any employee of SMBC, any agency worker or volunteer working for SMBC and the Elected Members of SMBC.

## 3. Application:

This policy applies to any of the following activities when undertaken by children and young people under the supervision or control (whether pastoral or direct) of SMBC staff or which are facilitated by SMBC, those schools for which it is the employer or those foundation and voluntary aided schools that have opted into the policy:

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

Academies, Foundation and Voluntary Aided Schools are not covered by this policy.

This policy applies regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

SMBC has formally adopted "OEAP National Guidance" as the source guidance for this policy from the website: [www.oeapng.info](http://www.oeapng.info)

It is a legal expectation that employees must work within the requirements their employer's guidance; therefore SMBC Children's Services & Skills employees must follow the requirements of "OEAP National Guidance"(NG), as well as the requirements of this Policy Statement.

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

SMBC 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 whatever their age, ability or circumstances.

SMBC actively supports and encourages such activities. In so doing, SMBC recognises that this may involve exposing participants to challenges and risks with which they may not be familiar. SMBC will put arrangements and procedures in place 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. It is SMBC's policy, so 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 means compliance with the guidance issued by the Outdoor Education Adviser's Panel ([www.oeapeg.info](http://www.oeapeg.info)) unless this guidance is specifically over-ridden by a requirement within this or any other SMBC health and safety policy;
- Be allocated sufficient resources (time, planning, staff, budget) to enable activities to be undertaken safely;
- There should be a risk management process that is demonstrated by a risk assessment, where the benefits of the proposed activity are balanced against the risks and detailed how the risks can be managed. There maybe some background or residual risks elements remaining and these could be viewed as acceptable. Part of the curriculum and learning for young people is to learn how to identify and manage appropriate risk. Where risks to participants are viewed as unacceptable, then the activity must not be carried out until further advice has been sought from a SMBC Outdoor Education Advisor (OEA);
- Be monitored to satisfy SMBC that the requirements of this policy are being met. The monitoring system that will be used is Evolve, an on-line electronic information, management and planning system for visits and LOtC activities.

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

- Reasonable checks of any external organisations that are contracted to provide any activities, regardless of whether these activities are being carried out on or off-site, are carried out to ensure that they are competent to provide such activities. The SMBC External Provider form found on Evolve should be used to demonstrate this competency;
- Checks would normally be via an external validation process using an Inspection and Accrediting Body, which may include: The Adventure Activities Licensing Service, The Learning Outside the Classroom Quality Badge, Adventuremark or sector approval schemes. SMBC confirms and endorses the LOtC QB scheme as acceptable without further checks required. Confirmation about an individual Awarding Body schemes should be via the OEA.
- The performance of external organisations is adequately monitored to ensure that agreed practices are being met ; and

- The significant findings of monitoring are acted upon and are reported to the appropriate Council Officer (OEA) and/or Governing body.

Where activities involve either travel abroad, residential or the provision of “adventure activities”, whether led by a SMBC staff or by a third party provider, then SMBC requires that these be notified to the OEA for outline approval early in the planning stages (Minimum 14 days prior to departure).

To secure these policy objectives, SMBC 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. Specifically, all schools and settings will be required to record and manage activities falling within the scope of this policy using the “Evolve” system; with regular local visits being maintained via a local system or using Evolve.
- Provide competent 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 fulfil their responsibilities within the scope of this policy;
- Provide access to suitable and sufficient information, instruction and training for all staff organising, facilitating, leading and advising 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; and
- Establish structures to enable the reporting of any significant findings of monitoring activity (e.g. accident/incident reports) to SMBC Health and Safety Support Team.

## **5. Organisational Responsibilities and Arrangements:**

Responsibility for community schools, community special schools, voluntary controlled schools, maintained nursery schools and pupil referral units, the employer is the local authority (LA), in this case SMBC. Therefore in addition to the overall responsibilities for managing health & safety matters that are described in the Council’s Health and Safety Policy, some specific responsibilities apply in relation to the activities covered by this policy.

For foundation schools, foundation special schools and voluntary-aided schools, the employer is usually the governing body. For independent schools, the employer is also usually the governing body or may be proprietor and therefore are not covered by this policy.

### **5.1 Director of Children’s Services & Skills**

The Director of Children’s Services & Skills is responsible for:

- Allocating sufficient resources to ensure that adequate competent advice is available to provide advice, guidance and support to SMBC settings providing activities falling within the scope of this policy. SMBC achieves this requirement by formally appointing an Outdoor Education Adviser;
- Ensure 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;

- Report significant failings in this policy to the Manager to the Health and Safety Support Team so that they can maintain effective oversight of day to day health and safety compliance.

## **5.2 Governing Bodies**

Governing bodies play a key role in providing oversight of all activities undertaken by the school. They 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. The results of monitoring should be discussed at governing body meetings.

## **5.3 Head Teachers**

Head Teachers are responsible for ensuring that any activities falling within the scope of this policy and over which they have, to any extent, control are:

- Approved the trip in line with the SMBC approval method on Evolve;
- Adequately resourced (in terms of planning, time, staff and budget) to secure compliance with the requirements of this policy and any associated procedures;
- Notify to SMBC's OEA where required under the terms of this policy;
- Visits led by only competent people;
- Risk management systems are in place, using SMBC risk assessment method to ensure that adequate risk management measures are implemented. For activities provided and delivered by third parties, reasonable checks of the provider, via the above systems should be used. The Head Teacher is not responsible for provider's risk assessments and should not undertake any further risk assessments of a providers activities;
- Monitored and any significant findings to SMBC's OEA and also to the school's Governing Body so that they can maintain effective oversight of these activities.

Head Teachers may appoint a member (or members) of their staff to carry out these duties on their behalf. Where such appointments are made, the Head Teacher remains responsible for the standard to be achieved and, as such, they must monitor the performance of these appointed persons (Educational Visits Coordinators or EVC) to ensure that the required tasks are being carried out correctly and competently.

Appointment of EVC's should be in writing and should set out clearly what tasks have been delegated to them, they are a member of the school SLT. EVC's should have sufficient authority (i.e. they should normally be a senior member of staff) to enable them to undertake their role and should be provided with the necessary information, instruction, training and supervision to enable them to discharge their duties effectively.

## **5.4 Educational Visits Coordinators (EVC)**

EVC's are responsible for delivering any tasks devolved to them by their Head Teacher. 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 Head Teacher.

## **5.5 Employees**

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 means:

- Cooperating with line managers and supervisors by implementing the agreed actions of any risk management process and planning, observing agreed wherever and whenever they undertake or are involved in activities falling within the scope of this policy; and
- 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 staff have been formally assessed as competent to undertake such responsibilities as they have been assigned, the Head Teacher will confirm this when the trip is authorised on the electronic Evolve system.

## **5.6 Health and Safety Support Team (HSST)**

SMBC's HSST will provide an OEA within the team to provide advice and guidance to duty holders named within this policy so that they can discharge their duties under this policy and any relevant statutory instrument effectively. The OEA is responsible for:

- Maintaining their competence and keeping abreast of legal requirements and sector and industry best practice with regards to activities covered by this policy;
- Report significant changes to legislation, sector and industry best practice to appropriate committees and ensure that employee representatives/ recognised trades unions are consulted on matters of health and safety relating to this policy and any associated procedures;
- Providing advice and guidance to schools and settings to enable activities to be carried out safely;
- Monitoring schools and settings to ensure that they are complying with all relevant legislation and the conditions set out within this policy and acknowledging when all is correct;
- Reporting the significant findings of monitoring, including any recommended corrective actions, to duty holders so that they can discharge their duties in accordance with this policy.

## **6. 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;
- or has gone missing for a significant and unacceptable period.

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 incidents, including any "near-misses", arising from activities covered by this policy must be reported to Health and Safety Support Team via the online accident/occurrence/near miss report form.

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

## **7. Monitoring and Review**

The effectiveness of this policy will be monitored and reviewed in accordance with the Council's Health and Safety Policy. The Evolve system will also be used as the monitoring system.

## **8. Further Advice**

All policies and procedures form part of Council employees' terms and conditions of employment and therefore care should be taken with their application.

Information on how to apply this specific policy is available from the HSST. Please contact the HSST Manager to provide any feedback on this policy.

## **9. Links to other Policies:**

This Policy has links and relates to a number of other policy documents and standards, these include:

- Adventure standards for D of E expeditions (on Evolve)
- Driving standards for SMBC employees and minibuses (On SMBC Intranet)
- Qualification requirements for staff leading adventure activities (on Evolve)
- The use of private cars (on SMBC Intranet)

## **10. Merstone and Forest Oak Schools:**

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 Evolve 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 Evolve visit including identifying those pupils with epilepsy that 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.
- For Forest Oak visits all of the above information is attached on one proforma. Due to the additional needs of the pupils at Merstone this information appears on separate documents.
- On the day of your visit, trip or LoTC always 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. If there are any changes please amend on the hard copy before you leave school.
- Paperwork is to be sent by Evolve 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.

