

Outdoor Learning and Off-Site Visits Policy

**For Schools and Children's
Services teams
where SMBC is the employer**

Outdoor Learning and Off-Site Visits Policy for schools and children's services where SMBC is the employer	Version: 4.1 January 2025
HSRP29	Uncontrolled when printed

Contents

	Page No.
1. Introduction: Who and What this Policy is for	3
2. Organisational Responsibilities and Arrangements	3
2.1 Outdoor Education and Advisors Panel National Guidance (OEAP)	3
2.2 The SMBC LOtC Reporting System	4
2.3 Notification and Approval of Educational Visits and Trips	5
2.4 Emergency Planning, Critical Incident Support, Incident Reporting and Insurance	5
3. SMBC General Requirements	6
4. Roles and Responsibilities	7
4.1 Director of Children’s Services	7
4.2 School Governing Body	8
4.3 Headteacher / Managers	8
4.4 Provision for Competent Outdoor Education Advice	9
4.5 Educational Visits Coordinators (EVC)	9
4.6 Visit Leaders	10
4.7 Employees	10
4.8 Health, Safety and Risk Service (HSRS)	11
5. Training	11
6. Further Advice and Guidance	12
7. Definitions of wording in this document	12

1. Who and What this Policy is for

Every year, children and young people from schools and children's services, where Solihull Metropolitan Borough Council (SMBC) is the employer, participate in outdoor learning and off-site visits and activities. These could include educational visits, school trips, outings, off-site visits, outdoor education, adventure activities, outdoor activities, learning outside the classroom (LOtC), residentials, field trips and field studies.

SMBC recognises the important role that outdoor learning and off-site visits can play. They can have a profound effect on children and young people and their well-being, positively influencing behaviour and relationships, developing self-confidence and raising achievement. In schools, they can provide a rich and rewarding educational experience that supports the personal development of children and young people whatever their age, ability or circumstances. Within children's services, they can provide enjoyable experiences that can contribute to the well-being and development of children looked-after.

This policy applies to occasions when children or young people take part in visits or activities, outlined above, that are led or organised by schools or children's services. Note: Arrangements may vary for residential children's homes to reflect the specific procedures they have in place, however, the principles of this policy will still apply to ensure robust health and safety arrangements are in place.

For PE activities in schools, education settings should follow specialist PE guidance from the Association for Physical Education (AfPE). Where PE takes place off-site, only the journey to and from the venue is covered by this policy.

This policy applies to schools and children's services teams where SMBC is the employer. Other schools such as foundation, voluntary aided and academy schools can use this policy as a reference and basis for their own employer's policy.

Visits and activities can provide opportunities that excite, challenge, motivate and stimulate children and young people, and enable them to discover the world. SMBC actively supports and encourages such activities. In doing so, SMBC recognises this may involve exposing children and young people to challenges and risks with which they may not be familiar. This policy aims to support schools and children's services to put their own 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 balance of risk against the benefits of the activity.

2. Organisational Responsibilities and Arrangements

2.1 Outdoor Education Advisors Panel National Guidance (OEAP)

SMBC has formally adopted the [Outdoor Education Advisors Panel \(OEAP\) National Guidance](#) as its source of guidance for this policy. It is a legal expectation that employees must work within the requirements of their employer's guidance; therefore, SMBC employees must follow and adhere to the requirements of the OEAP's National Guidance regardless of whether activities take place within or outside normal working hours, including weekends and holiday periods.

Each school must have its own site-specific policy for outdoor learning and off-site visits which must be followed and adhered to. For further guidance on writing a site-specific policy see:

[OEAP Guidance on Writing an Establishment Policy for Outdoor Learning, Off-Site Visits and Learning Outside of the Classroom \(5.3b\)](#)

Any teams within children's services that organise trips and activities are required to record their arrangements on how they will meet the requirements laid out in this policy. The OEAP guidance on writing an establishment policy may assist with this. Also see SMBC Local Health and Safety Policy Arrangements Template for Services on [SharePoint](#).

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 also included to assist with the effective planning of trips and visits. **Schools and children's services must follow the OEAP National Guidance to demonstrate that reasonable steps are being taken to manage risks.**

The Health and Safety Executive (HSE) and Department for Education (DfE) 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 also need to refer to the Early Years Foundation Stage Statutory Framework for minimum adult/child ratios and paediatric first aid (PFA) provision. When organising trips and off-site visits, the needs of the children and the context of the trip, and increasing ratios need to be considered, as required, with any statutory requirement.

2.2 The SMBC LOtC Reporting System

It is a SMBC requirement that schools record their visits including local, overseas, residential and adventurous activity visits on the approved educational visits software. This system is currently [eVisit](#).

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

It is recommended that teams within children's services also use eVisit, however, it is accepted that some teams within SMBC may have their own internal reporting and recording systems e.g. ClearCare in residential children's homes. Where different systems are used, they should meet the same criteria as eVisit including information on planning, management and approval of visits and activities; this should be detailed in local health and safety policy arrangements. Whatever systems are in place, these need to be clear and understood by all staff.

Reporting and recording on eVisit 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.

Login details are required to access eVisit. Please contact the Health, Safety and Risk Service by email at healthandsafetysupport@solihull.gov.uk or call 0121 704 6328 for assistance.

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

procedures in the event of an emergency, a missing child etc. The risk assessment can be uploaded to the visit form located in eVisit.

Note: Schools and children's services are responsible for ensuring that a visit specific, suitable and sufficient risk assessment is in place prior to undertaking any educational visits, trips and extra-curricular activities. The risk assessment should be completed on a SMBC risk assessment template. If alternative templates are used, they must meet the same criteria as the SMBC template. The assessment must be undertaken by a competent person who has sufficient knowledge, information, training and experience to enable them to assess the risks.

As part of the risk assessment process, the Foreign, Commonwealth & Development Office (FCDO) [travel advice](#) should be followed for any trips abroad.

Risk assessment e-learning training is available. For schools see [ClickHSE](#). For children's services this is available on Learning Pool. SMBC guidance on completing risk assessments is also available, for schools see [Solihull Protect Portal](#) and [SharePoint](#) for children's services.

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 schools and children's services ensure that a designated, competent 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. This should be recorded in the school's site-specific policy or service's health and safety policy arrangements.

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

Schools and children's services must ensure they have an **emergency plan** in place that includes children and staff on trips and outings. The school's site-specific policy for outdoor learning and off-site visits, or the service's local health and safety arrangements, should refer to their emergency plan, which should also include emergency procedures for visit leaders.

Staff need to understand the emergency plan including their roles and responsibilities in the event of an incident. Regular training on emergency planning is therefore recommended. Further guidance on emergencies and critical incidents is available on the [OEAP](#) website under guidance for each role.

If visits and activities take place outside of usual hours, for example over the weekend or during school holidays, the visit leader should ensure they have access to the Coventry, Solihull and Warwickshire (CSW) Resilience Team duty officer telephone number (02476 832673) which is covered 24 hours a day, 7 days a week. This phone number can be used for advice or to escalate to other services within SMBC. Please note, this is not a public facing phone number. The number can be detailed in emergency plans; however, it should not be publicly shared for example on websites.

For schools, emergency procedures should be developed by following CSW's [Emergency Planning Guidance](#). For children's services see CSW's [Emergency Planning Documents](#) on SharePoint.

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.

If any safeguarding 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. Resources are available via the CSW Resilience Team Website (listed above). The CSW resilience team also has a specific school resilience lead. For further details or support contact CSWRT@Warwickshire.gov.uk.

All health and safety related **accidents/incidents and near miss events** arising from activities covered by this policy must be reported to SMBC 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 any visits to ensure the quick and efficient reporting of any incidents. Please contact the Health, Safety and Risk Service by email at healthandsafetysupport@solihull.gov.uk or call 0121 704 6328 for assistance.

A business continuity plan, that defines what steps would need to be taken to be able to get back to business as usual following an incident, should also be in place. Schools and children's services need to also ensure they have access to relevant documentation/information should an event arise that means you are unable to access information held online.

For **insurance** schools should have their own school journey policy which provides cover for injury, loss and/or damage which is a form of travel insurance specific to schools. For children's services, any teams organising trips and journeys to far off places will need to consider travel insurance, e.g. trips overseas.

3. SMBC General Requirements

It is SMBC's policy, so far as is reasonably practicable, that:

- All visits and activities falling within the scope of this policy provide maximum assurance of safety for children and adults
- All visits within the scope of the policy are planned as an integrated part of the school curriculum to enhance every child's learning experiences
- Schools and children's services comply with the OEAP best practice guidance
- All school visits and activities are planned, managed and recorded on the SMBC approved visits software
- All visits and activities arranged by children's services are planned, managed and recorded on the SMBC approved visits software or internal recording system e.g. Clearcare's social care software, if applicable
- All schools and children's services have their own health and safety arrangements for identifying and managing risks during visits and activities. Any risks identified would need to be reduced to an acceptable or tolerable level, ensuring a balance of the risks against the benefits of the activity
- All staff are competent and have received up to date training to carry out their roles and responsibilities.

Where any activities that fall within the scope of this policy are being provided by a third party, SMBC will require that 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 \(4.4h\)](#).

Other accreditation schemes may help to provide reassurances about providers and reduce the need for further research or questioning. Example schemes are: 'Adventuremark', Association of Heads of Outdoor Education Centres (AHOEC) Gold Standard Accreditation 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](#).

Schools and children's services are also required to monitor the performance of external organisations to ensure that agreed practices are being met and any significant findings of monitoring are acted upon and reported to the governing body and leadership team, where appropriate.

4. Roles and Responsibilities

4.1 Director of Children's Services (supported by Assistant Directors for Education and Children's Social Care)

The Director of Children's Services (supported by Assistant Directors for Education and Children's Social Care) is responsible for:

- Following the [OEAP Guidance for Director of Children's Services \(3.4a\)](#). This document contains information including roles and responsibilities for the Children's Act 2004 and Corporate Parenting
- Providing clear and visible leadership on the application and implementation of this policy in all SMBC schools and children's services
- Ensuring there is an up-to-date employer policy relating to outdoor learning and off-site visits that applies to schools, children's services and employees
- Ensuring that where corporate responsibilities are delegated, e.g. Assistant Directors, they ensure that those nominated are competent and understand and accept the responsibilities being delegated to them
- Ensuring there is information, advice and guidance on teaching and learning approaches, the curriculum, educational legislation and the safeguarding of children and young people for outdoor learning and off-site visits
- Ensuring that sufficient resources are in place to ensure that competent outdoor education advice and support is available to schools and children services, 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 or call 0121 704 6328
- Ensuring that all delegated roles, duties and responsibilities are clearly defined
- Ensuring the SMBC Health, Safety and Risk Service (HSRS) are contacted on any significant health and safety issues reported by schools or services

- Reporting to the Corporate Health and Safety Board any concerns on the application of this policy
- Working in conjunction with the HSRS 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 have an awareness of the content of this policy and need to satisfy themselves that the policy has been fully implemented by the school. This includes having a suitable site-specific policy and procedures in place to adequately manage and monitor all activities falling within the scope of this policy. It also includes having a process in place to formally approve all educational visits, trips and extra-curricular activities.

For further guidance on the Governing Body's role, refer to OEAP [Governors, Trustees and Directors](#).

4.3 Headteachers / Managers

Headteachers and managers responsible for visits and activities falling within the scope of this policy are responsible for:

- Ensuring that a site-specific policy (schools) or documented health and safety arrangements (children's services) are in place
- Making sure all school visits and activities are planned, managed and recorded on the SMBC approved visits software
- Ensuring all visits and activities arranged within their team (children's services) are planned, managed and recorded on the SMBC approved visits software or internal recording system e.g. Clearcare's social care software
- Formally approving all trips, educational visits and extra-curricular activities
- Making sure adequate resources (time, budget, and staffing) are available to secure compliance with the requirements of this policy and any associated procedures to enable activities to be undertaken safely and without risk to health
- Ensuring all trips and activities are led by trained and competent people
- Appointing the services of a competent and experienced Outdoor Education Adviser (OEA) where required, as detailed in Section 4.4
- Ensuring significant risks are identified prior to any visits so adequate controls can be put in place to ensure the health and safety of employees, children and young people
- Making sure suitable and sufficient risk assessments are undertaken by a competent person and findings are communicated to all those involved. 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 \(4.3g\)](#).
- Monitoring site specific policies, local arrangements and risk assessments for their effectiveness and to ensure compliance
- Making sure the governing body and leadership team are updated on appropriate outdoor learning and off-site visits e.g. higher risk categories, so they have sufficient oversight as part of their role
- Ensuring significant health and safety risks and concerns are reported to the governing body and leadership team, as appropriate.

Headteachers and managers remain responsible for the standard to be achieved in all the areas outlined above. **To assist with the planning and management of outdoor learning and off-site visits, schools and teams within children’s services 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 and 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.

For further guidance on the headteacher/manager role, refer to OEAP [Head / Manager](#).

4.4 Provision for Competent Outdoor Education Advice

SMBC has delegated the responsibility of formally approving all trips, educational visits and extra-curricular activities to headteachers and managers within children’s services. It is therefore essential that those responsible for approving visits and trips are competent to do so and have the correct level of authority.

Whilst SMBC can provide basic advice and guidance as covered in Section 6, it is strongly recommended that for enhanced visits or activities, such as those which are one-off, not routine, or more complex or remote, **headteachers and managers appoint the services of a separate competent and experienced OEA, or equivalent, to help them to meet their responsibilities.** For further guidance on visit categories and how their STAGER variables and diagram tool can assist headteachers and managers refer to OEAP [Headteacher/Manager role \(1.b\)](#). The OEA should have sufficient knowledge, training and experience particularly when expert and specialist advice is required e.g. for higher-risk visits, such as visits overseas and visits including adventure activities or hazardous locations.

The OEAP can provide further information about the appointment of an OEA or consultant, contact secretary@oeap.info. See also [OEAP Advisers](#)

For more further information about the Outdoor Education Advisor role, refer to [Outdoor Education Advisor role \(3.4d\)](#)

4.5 Educational Visits Coordinators (EVC)

EVCs are members of staff who have been appointed by headteachers and managers to co-ordinate all outdoor learning and offsite visits. EVC’s should have sufficient authority i.e., they should normally be a senior member of staff, and time should be 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, EVCs will have the following responsibilities depending on the school setting or service:

- Consult a competent outdoor education advisor when expert advice is required (see section 4.4)
- Be a champion for all aspects of outdoor learning and off-site visits
- Challenge colleagues to use visits and outdoor learning effectively to provide a wide range of outcomes for children and young people
- Support/oversee planning so that well considered and prepared arrangements can lead to well-managed, engaging, relevant, enjoyable and memorable visits and outdoor learning

- Support headteachers and managers to ensure they fulfil their duty of care and comply with legal requirements regarding outdoor learning and off-site
- Ensure good practice in the provision of outdoor learning and off-site visits
- Complete EVC Training, followed by revalidation training as detailed in this policy
- Mentor visit leaders, supporting their ongoing development and training
- Ensure that visit leaders are competent to lead the activities and visits to which they are assigned
- Ensure that Disclosure and Barring Service (DBS) disclosures are in place as necessary
- Support Visit Leaders to ensure that parents are fully informed about visits and to obtain parental consent as necessary
- Ensure that emergency arrangements are sufficient and that there is an emergency contact for each visit
- Bring any significant failings related to the compliance of this policy, site specific policies or local arrangements to the attention of their headteacher or manager
- Deliver any tasks delegated to them by their headteacher or manager.

For further guidance on the [Educational Visits Coordinator](#) role, refer to OEAP website.

4.6 Visit Leaders

Visit/activity leaders are members of staff who have been given overall responsibility for managing visits.

Visit leaders:

- Have a legal duty of care and must comply with this policy and associated site-specific policies and local arrangements
- Have overall responsibility for a visit. This includes the learning, development, supervision and welfare of children and young people and health and safety of all, including any other leaders and helpers.
- Have responsibility for completing Visit Leader training, followed by revalidation training as detailed in this policy.

For further guidance on the [Visit Leader](#) role, refer to OEAP website.

4.7 Employees

Employees must ensure that whilst at work they take care of their own health and safety and that of other people who may be affected by what they do or reasonably fail to do. In the context of this policy this means:

- **Co-operating** with headteachers and managers by implementing the agreed actions of any risk management process and planning
- **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. For further information about staff competence see OEAP [Headteacher/Manager role \(1.b\)](#).

4.8 Health, Safety and Risk Service (HSRS)

SMBC's HSRS will provide general health and safety advice and guidance on outdoor education and off-site visits. They will:

- Work in collaboration with children services to review this policy
- Provide general health and safety advice and guidance to schools, settings and children's services to help promote the safe management of visits and trips (*headteachers and managers should consider appointing the services of a separate competent and experienced OEA for higher-risk visits and those with complex arrangements as outlined in Section 4.4*).
- Keep up to date on changes to health and safety legislation and guidance
- Provide a visits management software system for schools and children's services
- Ensure that any relevant accidents/incidents arising from activities covered by this policy are reported to the Health and Safety Executive under Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR)
- Include as part of the general health and safety audit process, a sample of checks to monitor the standards contained within this policy
- Provide EVC and visit leader training.

5. Training

EVC training, revalidation training and visit leader training courses are available through the SMBC Health, Safety and Risk Service. Staff will need to review their training every 3 years. For further information on course specifications and dates please visit the [Solihull Protect Portal](#) or contact 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 6 hours)
EVC	EVC Re-validation training	The course is aimed at those who have previously undertaken the full day EVC course and have 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 3.5 hours)

Target Audience	Course	Description	Duration
New and Experienced Visit Leaders	Visit Leader Training	<p>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.</p> <p>The course is focused on active risk assessment and group management on educational visits and offsite activities. Primarily aimed at staff leading visits however it is open to all school/college staff who wish to become more competent in leading educational visits.</p> <p>Visit Leaders are expected to undertake Visit Leader Training every 3 years.</p>	Half day course (face to face 3.5 hours)

6. Further Advice and Guidance

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

General health and safety advice & guidance:

Health, Safety and Risk Service
Resources Directorate
Solihull MBC
Tel: 0121 704 6328
Email: healthandsafetysupport@solihull.gov.uk

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

Education Outcomes and Intervention Service
Education, Inclusion and Additional Needs
Solihull MBC
Tel: 0121 704 6620
Email: seisenquiries@solihull.gov.uk

Note: Headteachers and managers should consider appointing the services of a separate competent and experienced Outdoor Education Adviser (OEP) for higher-risk visits and those with complex arrangements as outlined in Section 4.4 of this policy.

7. Definitions of wording in this document

Activity: Any specific component of a visit. This might be a specific activity (such as cycling or pond dipping) or other elements (such as travel or residence). Visits should be regarded as comprising a series of consecutive and/or concurrent activities.

Adventure Activities: An activity which is exciting and challenging, and which involves significant inherent risk of harm, without which the activity would lose much of its value, or which takes place in a remote or hazardous location.

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

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 activities in schools on split sites. The activity is planned and organised by 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 schools or children's services.

Offsite visits: Collective term for trips, outings, residential etc.

Outdoor Learning: Collective term for educational visits, school trips, outdoor education, adventure education, outdoor activities, Learning Outside the Classroom (LOtC), residential, expeditions, field trips and field studies.

Learning Outside of the Classroom (LOtC): Teaching and learning that takes place in settings other than the classroom providing children and young people with challenging, exciting and different experiences to help them learn. Some of this work will be covered by Educational Visits.

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