



# Offsite Activities and Educational Visits Policy 2023

August 2023

Leanne Bentley



# Contents

<b>Introduction.....</b>	<b>5</b>
<b>1. Roles - specific requirements and recommendations .....</b>	<b>7</b>
1.1 ESCC role .....	7
1.2 Children’s Services establishment roles .....	7
1.3 Assessment of Leader and Assistant Leader competence .....	8
1.4 Monitoring.....	9
<b>2. Using the Offsite Approval Service.....</b>	<b>11</b>
<b>3. Exeant Offsite Approval Software .....</b>	<b>13</b>
<b>4. Risk Management .....</b>	<b>15</b>
4.1 Effective supervision .....	16
4.2 Vetting and Disclosure and Barring Service (DBS) .....	17
<b>5. Inclusion.....</b>	<b>18</b>
5.1 Discrimination .....	18
5.2 Exclusion for behaviour .....	18
<b>6. Charging for Visits .....</b>	<b>20</b>
<b>7. Insurance.....</b>	<b>21</b>
7.1 School journey insurance .....	21
7.2 Public liability insurance.....	22

7.3 Dual insurance .....	22
<b>8. Adventure Activities Licensing Regulations .....</b>	<b>23</b>
<b>9. Planning a Visit.....</b>	<b>24</b>
9.1 Pre-visits and choosing a provider .....	24
9.2 Accommodation .....	25
9.3 Contracts .....	25
9.4 Waivers .....	26
9.5 Overseas visits .....	26
9.6 Planning the visit.....	28
9.7 Consent .....	30
9.8 General Data Protection Regulation (GDPR) .....	31
9.9 Retention Schedule .....	32
9.10 Evaluation and value of offsite activities and educational visits.....	32
<b>10. Critical Incident Support and Emergency Planning.....</b>	<b>33</b>
10.1 Emergency Contact.....	34
10.2 Reporting accidents .....	34
<b>11. Transport .....</b>	<b>35</b>
<b>12. Training.....</b>	<b>36</b>
<b>13. Duke of Edinburgh’s Award (DofE) .....</b>	<b>37</b>
<b>14. Useful contacts .....</b>	<b>38</b>

**Policy Reviewed or Updated ..... 39**

Dates and amendments ..... 39

# Introduction

East Sussex County Council (ESCC) recognises that offsite activities and educational visits for young people enrich the curriculum and provide numerous benefits to a young person's development.

The council encourages exploration of the wide range of opportunities available for learning outside the classroom. A policy should support this clearly identifying what is needed to deliver a successful trip. The administration of this should be kept to a minimum.

The target audience for this policy is any educational establishments or function undertaking offsite visits. Key personnel include:

- the Visit Leader
- the Educational Visit Coordinator
- the Headteacher
- a designated governors where applicable

The owner of this policy is the Director of Children's Services. The policy administrator is the Children's Services Offsite Education Adviser (OEA). Contact details for relevant officers within the council are at section 14 below.

This policy is an update of the Offsite Activities and Educational Visits Policy 2021. The policy has been reviewed and updated based on revised guidance from:

- the Outdoor Education Advisers' Panel (OEAP)
- the Department for Education [DfE health and safety on educational visits 2018](#)
- ESCC

Where there is a clear conflict between the establishment policy, National Guidance and the Employer Policy, follow the Employer Policy.

The National Guidance is endorsed by several key national organisations. These include:

- The National Union of Teachers
- The Association for All School Leaders
- Aspect- the union for professionals
- The Council for Learning Outside the Classroom
- The Health and Safety Executive (HSE)
- The Independent Outdoor Group

It is being adopted by an increasing number of establishments. The guidance is also compatible with the Offsite Approvals software - Exeant. This Exeant software was introduced in January 2013.

By continuing to adopt National Guidance, the council can give full assurance that the health and safety of pupils and young people undertaking outdoor activities will be managed effectively and consistently. In conjunction with the expertise of the Offsite Education Service and the intuitive Offsite Approvals software, a high level of support is available for the users of the system.

This policy is reviewed once a year. It is reviewed response to legislative change and lessons identified from incidents and near misses.

# 1. Roles - specific requirements and recommendations

## 1.1 ESCC role

ESCC has a responsibility as an employer and service provider for offsite activities and educational visits.

OEAP National Guidance identifies this under **1c Status, Remit and Rationale** and **3.1a Requirements and recommendations for employers**. In summary ESCC will provide:

- **Appropriate Guidance** - National Guidance, [The Outdoor Education Advisers' Panel \(OEAP\)](#) and this policy document
- **Training Courses** to support the guidance to ensure it is understood (see section 'Training Courses')
- **A suitable system to approve visits**. These include residential visits, adventurous activities or environments, overseas visits and for the notification of visits outside 'Sussex.' This is through the [Exeant approvals software system](#)
- **Access to advice, support and key updates** - Any National Guidance updates and reviews are highlighted in the 'updated document' section of the website. ESCC publishes updates and information under the documents section on the Exeant website They will be sent out through Exeant messenger to all Educational Visits Coordinators (EVCs).

## 1.2 Children's Services establishment roles

OEAP National Guidance sets out clear and detailed roles, responsibilities and functions that relate to most Children's Services establishments. Refer to the individual OEAP documents listed below to meet the requirements for specific

roles. Understand the responsibilities those roles hold:

1. Member of Board of Governors or Managing Body 3.4f
2. Headteacher 3.4g
3. Manager of an establishment other than a school 3.4g
4. Educational Visits Coordinator (EVC) must have EVC training. This should be updated every three years and meet the OEAP requirements as set out in section 3.4j
5. Visit or Activity Leader 3.4k
6. Assistant Visit Leader 3.4l
7. Volunteer Adult Helper 3.4m
8. Those in position of parental authority 3.4m

## 1.3 Assessment of Leader and Assistant Leader competence

There is clear advice about the assessment of leader competence, which is reinforced through EVC training and Visit Leader training. ESCC has an expectation that Visit Leaders are experienced and are deemed competent to undertake the responsibilities of the role. There should also be an Assistant Leader who is deemed competent to take responsibility if the Visit Leader is unable to do so.

Establishments should have a clear process for approving people to lead visits or activities. They should be able to demonstrate the ability to operate to the current standards and recognise good practice for that role. All staff and helpers must be competent to carry out their defined roles and responsibilities. It is a requirement that Early Career Teachers (ECT) only lead visits once the Headteacher has approved them as competent and having the relevant experience. It is highly recommended that they complete Visit Leader training. Careful consideration of competence issues must be undertaken in respect of newly appointed staff.

The OEAP National Guidance sets a clear standard to which East Sussex leaders **must** work. The guidance states that a Visit Leaders must be accountable,

confident, and competent. This means they:

- understand the chain of accountability, what is expected of them, and the establishments policies and procedures. They must have the ability to take charge of a situation while being aware of their abilities, as well as their limitations.
- demonstrate the ability to operate effectively. Have sufficient relevant experience and knowledge of the activities, the group, and the environments in which the visit will take place.
- take control and remain calm in a crisis.

Make judgements about the Leader's competency through:

- Observations
- Evidence of relevant experience
- Personal interests and experience relevant to the proposed activities and environment
- Evidence of undertaking appropriate training e.g. Visit Leader training
- Evidence of relevant qualifications

Refer to '**3.2d Approval of Leaders**' National Guidance and '**4.3a Good Practice Basics**'.

## 1.4 Monitoring

ESCC will sample monitor offsite activities and educational visits undertaken by the establishments. They are covered by the offsite approval service. Monitoring will be kept in-line with the recommendations of OEAP National Guidance. ESCC delegates a level of monitoring to the establishment. This includes monitoring the establishment policy for offsite visits. Monitor the role of the EVC, Headteacher or manager, governors and Visit Leader. Monitor the procedures for approving visits that fall outside of the ESCC remit. Sample monitor the practice on visits through observations by EVC or Headteacher and monitor post visit

evaluations and reviews.

Refer to OEAP '**3.2b Monitoring**'.

## 2. Using the Offsite Approval Service

Establishments using this service **must** ensure that they have their own establishment offsite visit policy. This must link to this policy document and National Guidance. All employees must have access to it.

The establishment must also identify an Educational Visits Coordinator (EVC) who meets the requirements. This is set out in section **3.1b Requirements for Establishment** of the National Guidance. The EVC must be formally trained and receive update training every three years.

It is important that the documents highlighted as essential reading on the National Guidance website are read. These must be read along with documents that are relevant to the role and fall under the ‘**Legal Framework and Employer System**’. These set out the legal expectations.

### **ESCC maintained schools and youth services**

It is a **legal** expectation that employees must work within the requirements of National Guidance, as well as the requirements in this policy. Using this service means your establishment will record all overseas, residential and visits involving adventure activities or environments through **Exeant** (see section 3). Formal approval from the OEA is required **four weeks in advance** of a visit. It is required that all visits outside of Sussex are recorded on the system for notification purposes, prior to the departure date.

Local day visits do not require ESCC approval. It is strongly recommended that all visits are submitted on the system or that establishments implement their own robust system for visits that fall outside the ESCC remit.

### **Academies, free schools and independent schools that purchase the ESCC offsite approval service**

You are advised to submit all overseas, residential and visits involving adventure activities or environments through Exeant (see section 3). This is so the OEA can

provide you with advice and guidance in line with the OEAP National Guidance. This must be submitted **four weeks in advance** of the visit. If any visits in these categories are not submitted on the system or within the deadline, the OEA is unable to provide the establishment with advice. It is also recommended that you submit all visits that take place outside Sussex for notification purposes prior to the departure date. Exeant can be used for all visits.

### **Visits not submitted on Exeant**

It is recommended that your establishment policy specifies an appropriate procedure and a timescale for visits to be submitted. This should allow time for alterations to be made. Routine offsite visits, which are straight forward and are covered by blanket consent, or do not require consent, can be covered by a generic risk assessment and should be written into the school's visits policy. This could include, PE fixtures, weekly swimming lessons, Forest Schools, local learning areas or 14-19 curriculum activities.

### 3. Exeant Offsite Approval Software

This is the web-based system for recording and approving offsite visits. Exeant links to National Guidance and includes hyperlinks to relevant documents. This helps in the completion of the online form.

The system will:

- notify the **EVC** and **Headteacher** of intended visits, allow them to make comments and approve or decline a visit application
- inform the **Offsite Education Adviser (OEA)** where ESCC approval or advice is required
- allow **Schools Governors** to have 'read only' access so that they can receive an overview of which visits are taking place

For each establishment there must be a registered, qualified EVC and a Headteacher or manager. They will be responsible for checking and internally approving or rejecting visits.

Establishment staff responsible for leading visits will need to register and are responsible for submitting visit details onto Exeant, ensuring they upload:

- The relevant risk assessments (e.g. down time if residential)
- Accommodation checklist
- A copy of the letter to parents
- A completed **provider statement** for centres providing adventure activities. Also tour operators that do not have a Learning Outside the Classroom (LOtC) Quality Badge

Other documents you may wish to upload could include expedition route-cards (DofE), trip itinerary, finance records (for establishment use), registers.

The EVC and Headteacher or manager have a responsibility for ensuring staff changes are managed on the system. Staff who leave should have their accounts

disabled. If the EVC or Headteacher is leaving, contact the OEA at ESCC to inform them and ensure there is an adequate replacement. Equally, the OEA should also be informed if the EVC or Headteacher is off for a prolonged period of time.

**Visits that require ESCC approval cannot take place until approval has been granted as this could jeopardise the insurance cover in place. It is recommended that Academies, free schools and independent schools follow the advice of the OEA. However, ultimately the decision is that of the Headteacher.**

## 4. Risk Management

As an employer, ESCC has a legal duty to ensure that risks are managed and reduced to an acceptable level. This requires proportional risk management systems to be in place. ESCC provides training, support and resources to help implement this. The risk assessment template is under 'documents' on Exeant. This can be adopted and adapted to make the process easier and more consistent. ESCC recommends ESCC maintained schools and services use the ESCC template.

Non ESCC establishments must ensure their template complies with the **Health and Safety Executive 5 steps to Risk Assessment** model.

The Visit Leader must complete and sign the risk benefit analysis or risk assessment. These signatures can be electronic. The EVC and when required, the Headteacher should check the risk assessment as part of the approval process. If the risk assessment is for a visit that is not submitted on Exeant then the EVC and in some cases the Headteacher should check and sign the risk assessment.

An important aspect of a risk awareness approach is to take into account the benefits to be gained from participating in a particular activity and weigh them against the risks. This would mean any residual risk (i.e. risk remaining after control measures) is 'acceptable'. The Health and Safety Executive (HSE) endorses this approach and also acknowledges the importance of young people being educated in risk management and taking responsibility for the outcomes of their own actions.

- [HSE five steps to risk assessment](#)
- [ESCC risk assessment template](#)

Please refer to 'Risk Management - an overview 4.3c, some practical advice 4.3f, what to record and how 4.3g' sections of National Guidance.

## 4.1 Effective supervision

There are no legally set ratios to abide by in respect of staff to pupil ratios for offsite visits. It is important to consider:

- **Staff:** abilities, experience, qualifications, rapport with children. The consequences of a staff member being indisposed.
- **Timing:** duration of the visit, time of year impact, in or out of normal hours.
- **Activities:** prior experience, who is leading the activities.
- **Group:** abilities, behaviour, maturity, specific individual needs.
- **Environment:** in or outside, public spaces, urban, rural.
- **Remoteness:** distance from the establishment, impact on travel, communication and support in an emergency.

### Ratios

It is important to remember that an effective ratio for one group may not be effective for another group completing the same visit. A ratio should be determined through the process of a risk assessment.

### Early Years

Refer to page 28 and 29 of the [Early Years framework](#) which sets the legal ratios for onsite, therefore offsite visits would require a higher ratio. If providing a residential experience one member of staff must be awake at all times.

ESCC requires all visits to have **one** identified Visit Leader and an identified Assistant Leader. Both should meet the requirements specified by the OEAP National Guidance for these roles. Only in exceptional circumstances, whereby the risk assessment deems it appropriate, can a visit take place with one member of staff (e.g. a park next to the school). In these circumstances there should be a clear procedure in place for communicating the group are going offsite, when they are due to return and for support when it is needed.

Refer to OEAP National Guidance ‘**4.3b Ratios and Effective Supervision**’ and ‘**4.2a Group Management and Supervision**’.

## 4.2 Vetting and Disclosure and Barring Service (DBS)

Individuals who engage in regulated activity with young people or vulnerable adults should undergo an enhanced DBS check, with a barred list check. Therefore, it may not be necessary for a parent helper to have a DBS check for a day trip unless they meet the criteria for frequency or intensively as stated below. Where the visit involves a residential an enhanced DBS and barred list check is required.

**Frequently** is defined as "once per week or more."

**Intensively** is defined as four days or more in a 30 day period or overnight (between two am and six am, where there is opportunity for face to face contact).

However, it must be understood clearly that a DBS check (or other vetting and barring procedure) on its own is not a guarantee of the suitability of an adult to work with any given group of young or vulnerable people.

Refer to OEAP National Guidance ‘**3.2g Vetting and DBS Checks**’ for further information and examples of when an adult may require a DBS check.

# 5. Inclusion

## 5.1 Discrimination

The Equality Act 2010 states that the responsible body of a school must not discriminate, harass or victimise a pupil to whom one of the protected characteristics applies in the way that it affords (or not) the pupil access to a benefit, facility or service. These include disability, gender reassignment, pregnancy and maternity, race; religion or belief, sex and sexual orientation. There is a duty to make reasonable adjustments.

Every effort must, therefore, be made to ensure that offsite activities and educational visits are available and accessible to all. Reasonable efforts must be made to find a venue and activities that are suitable and accessible for the whole group to participate in fully. The principles of inclusion should be clearly reflected in the establishment's policy. Visit Leaders should consider the need of the group at the earliest point when planning a visit, so they can ensure the needs of the young people are met. In some circumstances it may be impossible for reasonable adjustments to be made to enable someone to be included on a visit. In this case it is not necessary to deprive the rest of the group. However, you must demonstrate that what happened was for a reason other than unfair discrimination. The reasonable adjustments template can help record and identify feasible adjustments. Please contact the OES at the earliest point if you have any queries relating to inclusion.

## 5.2 Exclusion for behaviour

Behaviour is not a protective characteristic defined by the Equality Act. It may therefore be acceptable to exclude someone from an activity or visit if their potential behaviour presents a significant, unmanageable and unacceptable risk to the health, safety or welfare of either themselves or others. Also if it effects the successful completion of the activity or visit. However, if the behaviour is

associated with a protected characteristic, great care should be taken to ensure that unfair or illegal discrimination does not take place.

If the expectation is that parents will be responsible for collecting a child from a visit due to unmanageable or unsafe behavior this should be set out and clearly communicated to the parents in the visit code of conduct. The school should consider the implications if parents or carers cannot drive or if there are any costs involved in a pupil returning early.

Refer to OEAP National Guidance '3.2e Inclusion'. **Special educational needs and disabilities 4.4.i 4.4L Transgender Young People and Visits. 6L FAQs:**

**Transgender young people and visits**

[Reasonable Adjustments Template](#)

[Emotional wellbeing and mental health guidance document](#)

Supporting children with medical conditions document is available on the webshop resources page.

## 6. Charging for Visits

There is a legal framework relating to charging for visits, voluntary contributions and remissions that Headteachers or managers, curriculum planners, EVCs and Visit Leaders must take into account. These are set out in the Education Act 1996 sections 449-462.

Refer to '**3.2c Charges for Offsite Activities and Visits in an Educational Establishment**', [Charging for school activities - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/charging-for-school-activities)

# 7. Insurance

## 7.1 School journey insurance

ESCC maintained schools and Children's Services Department (CSD) teams will automatically be covered by the ESCC school journey insurance arrangements. However, any schools that have opted out of our corporate arrangements will no longer have cover and will need to ensure they have alternative insurance in place.

Maintained schools are required to take a copy of the [Insurance certificate](#) with them on all overseas visits.

Academies, Free Schools and Independent Schools will need to purchase their own insurance. It is important to ensure the Visit Leader, EVC, Headteacher or manager are aware of any exemption the insurance policy has as this may restrict some visits or activities from taking place. They must also be aware that elements of recovery and repatriation are covered.

If you are planning to participate in an unusual adventure activity, please inform the OEA as soon as possible so that the appropriate checks can be carried out with regards to insurance cover.

Refer to OEAP National Guidance '4.4c Insurance'

## 7.2 Public liability insurance

When a service provider is coming into a school the provider must have £10 million public liability cover. This can be achieved by the provider holding £10 million level of insurance outright or by the provider taking £5 million and then topping up with a further £5 million through ESCC contractors top up insurance. Anyone with less than £5 million of their own insurance cannot provide services within schools.

The requirement for £10 million public liability exists for offsite visits. This means any venue, provider including tour operators, travel agents or accommodation should have £10 million public liability insurance. Offsite visits to public services and places where the risk assessment perceives the risk to be low may have lower public liability insurance which would still be acceptable.

In some circumstance where the provider is not offering a residential, the public liability insurance may be topped up by the ESCC contractors top up scheme if they hold a minimum of £5 million public liability insurance. This is only available if they are entering into a bespoke contract purely with your school.

Non ESCC schools are not able to access the ESCC top up scheme, however they are not limited to providers holding £10 million public liability insurance however this is recommended. It is advisable that providers do not have any less than £5 million public liability insurance.

## 7.3 Dual insurance

There are potential dangers to having dual or double insurance. This can lead to a more complicated claims process or even invalidated one or both policies. Where insurance is included in a package and you are covered by ESCC school journey insurance you should compare the policies and discuss with the ESCC insurance team. Be aware that some providers will automatically include you in their insurance scheme unless you explicitly confirm you do not want it. In this scenario the ESCC policy will not operate.

# 8. Adventure Activities Licensing Regulations

Employers, Headteachers or managers, EVCs and Visit Leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated.

The Adventure Activities Licensing regulation is the direct responsibility of HSE. It operates through the Adventure Activities Licensing Authority (AALA). AALA license is an assurance of safety. It does not accredit educational or activity quality.

The activities covered by the scheme are caving, climbing, trekking and watersports. The regulations and supporting inspection regime provide a formal process of professional inspection to accredit that providers have effective safety management systems and processes that meet a national standard. Anyone who provides facilities for 'in scope' adventure activities to young people under the age of 18 in return for payment must have a license and abide by its conditions.

The definitive source of advice on the Licensing Regulations can be found in the HSE publication ['Guidance to the Licensing Authority Activity Licensing Regulations 1996'](#).

Refer to OEAP National Guidance '**3.2f AALA Licensing**'.

# 9. Planning a Visit

## 9.1 Pre-visits and choosing a provider

ESCC strongly recommends pre-visits wherever reasonably practicable, particularly to unfamiliar sites, as a vital dimension of risk management. Pre-visits enable the Visit Leader to assess the provider to see if they have a suitable venue, facilities and programme. It is recommended that the **4.4f Assessing a provider - checklist** is complete. It also allows the Visit Leader to familiarise themselves with the environment, noting hazards, location of facilities and assess the requirements for effective supervision. The cost of a pre-visit can be incorporated into the total cost of the visit.

There are national accreditation and provider assurance schemes that the OEAP acknowledges and recommends as a sign of quality assurance.

ESCC recognises the LOtC Quality Badge as a benchmark for assurance of safety and quality. Details of the LOtC quality badge and the database of providers can be accessed through the [LOtC quality badge](#).

ESCC requires providers of adventurous activities and tour operators to hold the LOtC quality badge and to have £10 million public liability insurance. No further assurance is required. However, it is important to check that the provider's ethos matches your expectations and whether the provision meets the needs of the group. Clarification on supervision and 'down time' arrangements should be obtained. You should have a clear understanding of the providers and the school's roles and responsibilities.

If a provider does not hold a LOtC Quality Badge, then it is a requirement for an OEAP National Guidance '**Provider Statement**' 8q to be completed. This must be uploaded as part of the approval process. This should be conducted in advance of making a booking and checked with the OEA. ESCC recommends that for non-adventurous activities the LOtC Quality Badge is still used for quality assurance.

Where the provider does not hold the LOTC Quality Badge the provider statement is completed.

Refer to OEAP National Guidance '4.4.g Selecting External Providers and Facilities, 4.4.h Using External Providers

## 9.2 Accommodation

The type of accommodation will vary visit to visit and standards abroad can differ from what we would expect in the UK. Where possible, the Visit Leader should carry out a pre visit to satisfy themselves of the arrangements. Where this is not possible, they should seek to gather as much information as possible to satisfy themselves about the accommodation arrangements. The Visit Leader must ensure the accommodation checklist is completed and uploaded to Exeant.

Accommodation must have £10 million public liability insurance.

## 9.3 Contracts

When booking a provider, it may involve entering into a contract. It is important that any contractual agreement is between the provider and the establishment. It should NOT be directly between the provider and the parents or participant.

Before entering a contract, be fully aware of and understand the terms. In particular be aware of, cancellation terms, including cancellation arising from health issues including COVID, acknowledgement of risks or waivers, general terms and conditions including personal data.

For some activities where there is a higher level of risk such as skiing, mountain biking and go karting, the provider should provide you with information about the risks involved. The establishment must ensure this is shared with the participants and the parents so consent is fully informed.

## 9.4 Waivers

When booking with a provider they should make it clear at the time of booking that there is a waiver or risk acknowledgment statement in place. It is bad practice for a waiver to be presented at a late stage such as on arrival. Waivers should not attempt to limit liability for death or personal injury resulting from negligence. This is illegal under The Unfair Contract Terms Act 1977. This should not be signed.

ESCC recommend that you check if the provider expects a waiver to be signed prior to making a booking. Ask for a copy of the waiver and send it to the OES who will consult our insurance team for advice on whether the waiver should be signed.

Refer to OEAP National Guidance, **4.4.h using external providers and facilities, Provider statement 8q, 3.2i Contracts and Waivers**

## 9.5 Overseas visits

When planning an overseas visit, before booking with a provider or tour operator, consideration must be given to the geopolitical risks associated with the destination(s). In some circumstances it will be necessary for the Visit Leader and EVC to complete a [threat assessment](#). Information from the [Foreign & Commonwealth Office \(FCO\)](#) will be sought when completing the assessment. Also information from the proposed tour operator and an in-country source must be sought where possible. Although not in high prevalence, schools should be aware of any restrictions relating to COVID. You must comply with international travel legislation and should have contingency plans in place to account for these changes. You must consult with your insurers and tour operator to discuss covid cover in your policy. This should include medical treatment, repatriation, cancellation or costs involved with quarantining.

The threat assessment should identify the significant geopolitical risks, including civil disturbance. It should also highlight and address any issues focusing upon inclusivity issues such as attitudes and laws towards LGBTQ+ students and staff. **This needs to be completed before booking with a provider.**

Where a threat assessment is required, the results should be discussed with the OEA and EVC. In some circumstance a meeting will be required to discuss the proposed plans for the visit including the requirements and expectations of the provider. This meeting will take place **at least six months in advance.**

In situations where a Local Authority school wishes to proceed with a visit despite a significant and likely threat to the group, which are not balanced by the benefits, or where the benefits could be achieved through an alternative destination, ESCC Children Services Senior Management Team will be briefed and impose the final decision.

In situations where an Academy wishes to proceed with a visit despite a significant and likely threat to the group, which are not balanced by the benefits, or where the benefits could be achieved through an alternative destination, the OEA will provide advice and guidance and suggest that the Academy Trust Management Board make the final decision.

For other all overseas visits parental consent needs to acknowledge that they have been fully informed of the visit arrangements. This must include the planned activities, accommodation type, travel arrangements and the risks involved in all aspects of the visit. Parents should also be made aware of the emergency medical facilities available to the group throughout the visit.

Once a visit has been completed the Visit Leader must complete a review of the visit. This should be discussed with the EVC and significant incidents or learning should be shared with the OES. For visits to destinations that require a threat assessment to be conducted, the Visit Leader and EVC will need to feedback to the OES to highlight, successes, key learning points and near misses. This meeting will take place **within two weeks of returning.**

Since departing from the European Union (EU), check the [government advice](#) on travel to Switzerland, Norway, Iceland and Liechtenstien if these are your intended destination. In addition you should refer to the Department for Education (DfE) guidance to schools for visits to the EU under the [‘school trips and exchanges’](#) section.

## 9.6 Planning the visit

Planning an offsite activity or educational visit should reflect the consideration of legal and good practice requirements set out by the OEAP within the National Guidance and this Policy document. ESCC recommends that the planning process is highlighted in the establishment’s policy. The following areas need to be addressed as part of the planning process, key requirements and actions:

- The setting of clear learning outcomes aims and benefits for visits. This helps identify what the visit programme may look like and will help plan, lead and review the visit.
- Proportionate assurances have been obtained from any provider through the LOTC Quality Badge, or a satisfactory OEAP Provider Statement form has been completed, including confirmation of public liability insurance.
- Contracts, terms and conditions and waivers are checked prior to booking.
- Complete a threat assessment (appendix 1) if required. Discuss the results and proposed plans with the OES at least six months in advance. If you are unsure if a threat assessment is required, please consult the OES.
- All staff (including adult volunteer helpers) and the young people should be involved in, and have knowledge of, the risk management process. This should include their roles and responsibilities and ensure the assistant leader has been identified.
- Access to first aid is considered and accessible, which is appropriate to the age of the children and their needs and relevant to the environment the group will be in. Please refer to the ESCC First Aid Policy and the First Aid and School Trips frequently asked questions.
- The administration of medicines (prescribed and non-prescription) is

planned for, with the relevant training for staff and consideration of the legal requirements for taking medication overseas.

- The school completes a risk assessment, ensuring that careful consideration is given to the needs of the group.
- The accommodation checklist is completed.
- Those in a position of parental authority have been fully informed of the visit programme and where appropriate formal consent has been obtained.
- The visit has a clear contingency plan.
- Designated 24/7 emergency contact identified for the duration of the visit. All details of the visit are accessible to the emergency contact.

Refer to OEAP National Guidance '**3.3g Checklist - overseas, 8.2b visit planning mind map, 8.2c visit planning flow chart.**

To identify the level of planning required for activities, access The Radar through OEAP National Guidance ['9a The Radar' introduction.](#)

## 9.7 Consent

Consent forms have been used in the past to get updated information about medical issues, food allergies etc. Visits that are part of the curriculum and a normal part of a child's education which take place during the school day do not require parental consent, such as local environment and local community visits. The school should decide how best to inform the parents.

ESCC recommends that consent be obtained using an annual consent form. These would be for all offsite activities and educational visits that require consent. For example for those trips that fall outside school hours, or visits that take place further away from the school site. Parents or carers need to be informed of the visit details, [ESCC Template](#). Academies, free schools and independent schools should review the ESCC template prior to use to ensure it reflects their insurance requirements.

Where an activity and visit falls within the adventurous, residential and overseas category, or where there is a third-party provider, ESCC recommends seeking consent on each occasion. Full details of the visit and activities should be provided, so that those in a position of parental responsibility can give informed consent. Information on charging and cancellation terms must also be communicated.

To avoid confusion as to when consent will be required and the type of consent, it is best practice to inform parents either when they enroll their child, within the prospectus, within policy documents or on the school website.

E-consent can be used, where systems allow, please refer to 4.3d consent for further information.

There is no requirement to carry consent forms on visits within the UK. However for visits outside of the UK please ensure consent forms are carried securely. Please refer to your establishment Data in Transit Policy.

## 9.8 General Data Protection Regulation (GDPR)

Ensure that the school consent form has the school logo on and explicitly states that the school is requesting this information. This will ensure it is clear that the school is the data controller.

Ensure that you are asking for consent to process the information e.g. the medical and contact information provided will be used to ensure effective planning for the inclusion of your child within the visit. Therefore, it may be shared with ESCC for the purpose of approving the visit and also shared with any provider involved in the delivery of the visit.

Parents need to be aware that if they do not allow this information to be shared it may mean that their child cannot be included within the visit. You have to ensure that all the fields of a privacy notice have been included or ensure a privacy notice is included. A good example can be found at [ESCC Children's Services, Your rights information](#).

Schools should check if consent has already been sought previously to take images of children for specified purposes. If so you may not need to seek consent again on a separate consent form such as those for school trips.

If the school uses systems to collect consent electronically, it is the school's responsibility to ensure they are GDPR compliant.

All personal data carried on a school trip should be done so securely and the school should refer to their establishment policy for 'Data in Transit.'

Consider who is carrying personal data on a school trip and ensure it is carried securely. At the end of the visit the Visit Leader should collect in any data that has been held by other staff or adults and either retain or destroy it appropriately.

For further information refer to the ESCC School Trips and GDPR Guidance document.

## 9.9 Retention Schedule

A child can make a claim for an incident three years after they have reached the age of maturity, meaning until they are 21 years old. In the case of those with special educational needs, the age limit is 25 years. Exeant will store visit information electronically for this retention period to evidence the effect planning and evaluation of visits.

Consent forms could be retained for this retention period. However the requirement for needing them is low in most situations where there has not been an incident on a visit. Therefore a risk assessment could be completed to decide if the forms could be disposed of. Where there has been an incident on a visit the consent forms for all pupils should be retained until they reach 25 years old.

For further information refer to the [IRMS toolkit for schools](#) or the [IRMS toolkit for academies](#).

## 9.10 Evaluation and value of offsite activities and educational visits

Evaluating offsite activities and educational visits is paramount to ensuring that learning outcomes and visit aims are achieved. It also ensures the quality of the activity or provider is assessed and the supervision measures in place for the group are adequate. The visit review will help inform the planning of future visits. Feedback on visits should be shared and discussed with the schools EVC. Any significant concerns or learning points and good practice should be shared with the OES.

Where overseas visits have taken place, and it required the need for a threat assessment to be conducted, then feedback to the OES must be completed within **two weeks** of returning.

Refer to OEAP National Guidance 'Reviewing 4.2c' and 'Evaluation 5.1d'

# 10. Critical Incident Support and Emergency Planning

A critical incident is defined as:

1. an incident in which any member of the group on an offsite activity or educational visit suffers a life-threatening injury or fatality. It is at serious risk or has gone missing for a significant and unacceptable amount of time.
2. an incident in which the normal coping mechanisms are not sufficient.

Should you need advice and support in a crisis or critical incident please contact ESCC. The following telephone numbers should be used:

**Normal office hours** 01273 481316 (08.30 to 16.30)

**Outside office hours** 0300 1233314 (16.30 to 08.30)

These numbers should be carried by the Visit Leaders, EVC, Headteacher at all times during an offsite activity or educational visit. They are only to be used in a genuine emergency. Do not give these numbers to young people or their parents or guardians.

Within your establishment's policy a clear Emergency Procedure needs to be set out in case of an incident whilst offsite. This should state when and who should contact ESCC Children's Services. If your establishment is the employer, then follow OEAP National Guidance recommendation for writing an establishment policy.

Staff leading visits and those involved in visits should beware of and have a practical knowledge of how to manage incidents. These may include critical incidents whilst offsite.

Refer to OEAP National Guidance 4.1a - 4.1g offsite visit emergency documents

## 10.1 Emergency Contact

For every visit an emergency contact needs to be highlighted, and this person should be contactable 24/7 for the duration of the visit. They should have all relevant information of the visit. This should include contact numbers, medical information, an itinerary and the establishment's emergency procedure. Also include the ESCC critical incident contact numbers. They should be an individual who can work well under pressure and in stressful situations.

## 10.2 Reporting accidents

The ESCC Health and Safety team has an online accident reporting system. This can be accessed via the 'incident reporting and first aid' webshop page. It is advised that a printed template is taken with the Visit Leader on any visit. This is so details can be written down whilst they are at the forefront of their minds. Please ensure that there is a system in place for handing over incidents or injuries to parents on return from a visit. This should reflect the procedure for informing parents of injuries sustained in school. For academies and schools not using the ESCC Health and Safety system, please refer to your own establishment policy for reporting incidents. If there are any significant incidents, near misses or violent incidents during offsite visits please inform the OES by email as soon as possible.

# 11. Transport

Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in the activity. Careful planning is required.

ESCC sets out clear requirements on using mini buses and private cars. These can be found under 'documents' on Exeant, along with template letters for using private cars. If buses or coaches are hired, this should be through a reputable company.

When using public transport, inform the company of the size of the group and the date on which you will be using the transport. Be respectful to members of the public and be aware of strikes, delays and cancellations.

Refer to OEAP National Guidance '**Transport: General Consideration 4.5a**'.**4.5d seat belts and child restraints, 4.5e hiring a coach.**

# 12. Training

We provide training courses for the following:

- Educational Visits Co-ordinator (OEAP Approved)
- Visit Leader Training (OEAP Approved)
- Outdoor Learning Cards (OEAP Approved)
- Governing body and management boards roles and responsibility for offsite visits
- Exeant and risk assessment training
- Crisis Management

These can be a central course or organised as bespoke sessions through contacting the OEA.

## 13. Duke of Edinburgh's Award (DofE)

In order to deliver the DofE award the school will need to hold a Direct Licence. ESCC maintained schools are required to get expeditions approved by ESCC OEA. It is strongly recommended that an academy with a service level agreement (SLA) for the offsite approval service also seek advice for their expeditions. The advice and guidance will be in line with the [ESCC DofE regulations](#).

## 14. Useful contacts

Offsite Education Service	<a href="mailto:Outdoor.education@eastsussex.gov.uk">Outdoor.education@eastsussex.gov.uk</a>
Principle Insurance Officer	<a href="mailto:tracy.unsted@eastsussex.gov.uk">tracy.unsted@eastsussex.gov.uk</a>
Health and Safety lead consultant	<a href="mailto:kim.hicks@eastussex.gov.uk">kim.hicks@eastussex.gov.uk</a>

# Policy Reviewed or Updated

## Dates and amendments

January 2020 - Overseas visits and Planning the visit sections. 9.2 and 9.3

August 2021 - 1.3 - visit leader

4 - risk management

5.1 - inclusion

5.2 - behaviour

7.1 - school insurance policy

7.2 - public liability insurance

9.1 - pre visits and choosing a provider

9.2 - overseas visits

9.6 - evaluation: value of offsite activities and educational visits

10 - critical incidents

August 2023 - Minor changes throughout

Assessment of leader and assistant leader competencies

4.1 - effective supervision

5.2 - exclusion for behavior