

LEARNING TOGETHER TO BE OUR BEST

**DOVER PARK  
PRIMARY SCHOOL**



**Educational Visit Planning and Approval Policy**

Date agreed: June 2024

Review date: June 2026

Signed: \_\_\_\_\_

Chair Board of Governors

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## 1. INTRODUCTION

Educational visits which occur off-site pose particular challenges when ensuring the health, safety and welfare of all involved. This will include pupils, staff and others affected by the activity. Early planning and approval is essential to identify any potential problems and risks that may occur. The health and safety of all involved in the activity is paramount, and as part of the planning for the activity, a full assessment of the hazards must be undertaken to identify and control risk to those participating in all school trips and activities.

It is essential that every person involved in the planning and running of Educational Visits is familiar with and understands the policy.

### SCOPE

This policy provides guidance to schools where the council is the employer, referred to as “local authority schools”, who wish to provide educational visits for school pupils. This policy confirms the procedure for the planning and approval for educational visits. The policy lists the stages of the process required by the council and provides the required documentation.

### AIMS

This policy:

- Defines what constitutes an educational visit, and whether a visit is off-site
- Identifies the key people in the planning and approval of the visit
- Provides forms for use in the planning and approval process for educational visits
- Ensures that the identified key people’s roles and responsibilities are clearly defined

### RESPONSIBILITIES

The council will:

- Provide, review and update the policy and all associated documentation
- Monitor, as part of annual school audits, the implementation and use of this policy
- Review a sample of conducted visits during the annual audit to ensure compliance with the policy
- Liaise periodically with the Health and Safety Advisers to discuss any issues or problems

The Head Teacher will:

- Nominate a suitable senior member of staff to be the Educational Visit Coordinator (EVC) for their school
- Ensure that the EVC is trained and updated as necessary
- Keep oversight of all educational and off-site visits, and audit and review completed visits
- Provide assistance as needed to the council in their monitoring of compliance with the policy

The Educational Visit Co-ordinator (EVC) will:

- Review Educational Visit Outline Plans and reject or approve as appropriate
- Review Educational Visit Plans and reject or approve as appropriate
- Liaise with their Health and Safety Adviser as necessary
- Ensure that they attend all training and updates as required by the Director of Children’s Services or their Head Teacher
- Escalate any concerns they may have to their Head Teacher.

The Visit Leader will:

- Prepare and present the Educational Visit Plan to the EVC via EVOLVE for approval: at least 2wks before the trip for a Local visit and at least 4wks before any other island based trip. All hazard activities or residential trips must be submitted at least 8wks before the trip and County authorisation gained.
- An Educational Visit Plan will include the necessary risk assessments for the various aspects of the activities, including travel, accommodation, First Aid, staffing etc have been included
- Ensure that all staff involved have the relevant competencies
- Ensure that any activity providers have been suitably vetted for health and safety competence
- Be trained in both risk assessment and dynamic risk assessment methodology to enable competent risk based decision making with emphasis on when things do not go as planned
- Be responsible for supervising some or all of the participants in the activity
- Ensure that the Educational Visit Plan is followed accurately
- Ensure that all staff involved have received copies of all relevant documents related to the trip/visit including Risk Assessments

The school's Health and Safety Adviser will:

- Give advice to any of the people involved in the planning of any activity
- Advise on risk assessments related to the visit
- Be prepared to give robust, constructive criticism where necessary

## 2. LEGAL FRAMEWORK

This document follows the principles set out by the Department for Education in relation to the health and safety responsibilities of schools for visits and trips (DfE 2014) and the detail contained within National Guidance, issued by the Outdoor Education Advisors Panel ([www.oeapng.info](http://www.oeapng.info))

Under the Health and Safety At Work etc Act 1974, employers are responsible for the health, safety and welfare at work of their employees. Employers are also under a duty of care to ensure, so far as is reasonably practicable, the health, safety and welfare of others on their premises or anyone who may be affected by their activities. By this definition, the local authority as employer has a duty of care to the local authority (community, special and voluntary controlled) schools, its staff, pupils and to members of the public who may be affected by Educational Visits.

The Management of Health and Safety At Work Regulations 1999 require employers to:

- assess the risks of their activities
- implement measures to control those risks
- tell their employees about these measures

Under health and safety legislation, employees must:

- take reasonable care of their own and others' health and safety
- co-operate with their employers over safety matters
- carry out activities in accordance with training and instructions □ inform the employer of any serious risks

### 3. Professional Duty of Care - "IN LOCO PARENTIS"

Schools have a common law duty towards pupils under the age of 18 known as "in loco parentis".

*Brown v Nelson and others [1971] LGR 20* found that schools have a general duty to take reasonable steps for the safety of those under their charge and that they "discharge their duty of care if they know the premises and if the premises are apparently safe, and if they know that the premises are staffed by competent and careful persons."

This means that teaching staff must take the same care of their pupils both on and off-site that a parent would take in the same circumstances. However, the courts also recognise that teachers and other professionals holding professional responsibility for children have a 'higher' Duty of Care which comes with the professional status. This requires teachers and others to plan, manage and supervise children in the context of their professional role, and not simply as a parent might. A breach of this duty of care leading to injury to a student will be seen as indicative of negligence.

The principal applies to all members of staff, including non-teaching staff, who take responsibility for school pupils. Voluntary supervisors are also covered by this, although the law would expect a higher standard of care from the professionals because of their training and experience.

### 4. DBS CHECKS

Adults who regularly supervise children and young people would be undertaking regulated activity. Regulated activity, within the context of Children and Young People means any activity that includes the teaching, training, instruction, care advising and/or guiding and driving will require an enhanced DBS check to be undertaken.

Parents or other workers who are accompanying visits and who are fully supervised by someone with an enhanced DBS check won't require a check to be undertaken. If it is not possible to guarantee that parents or other workers will be supervised by someone with an enhanced DBS check then they will require their own DBS check.

Guidance on regulated activity is available [here](#)

### 5. PREPARATION OF THE EDUCATIONAL VISIT PLAN

- All 'Educational Visit Plans' must be completed using the agreed online EVOLVE system.
- Plans must be submitted as follows:
  - At least two weeks before a 'Local Trip', a trip within walking distance of the school not requiring additional forms of transport.
  - At least four weeks before any other 'Island Based' trip/visit
  - At least eight weeks before any visit involving Hazardous' activities or a 'Residential'. Such trips would require additional authorisation from the Local Authority
  - Submitted must include:
    - A 'Risk Assessment Step 1'. (Appendix 1)
    - Risk Assessments for related activities including transport. (Appendix 2)
    - A note of nominated 'qualified' First Aider.
    - Staffing. (See Supervision Ratios)
    - Letters sent to parents relating to trip.
    - Copy of the EV3 completed by parents. (Appendix 3)

Not required for Local Trip:

Itinerary,  
Letters sent to parents relating to trip.

- All trips other than those classified as 'Local' require parents to complete an EV3 for their child. These need to be taken on the trip itself and a copy held at the School Office.

## **6. HEALTH AND SAFETY ADVICE**

The Activity Organiser and EVC must seek advice on health and safety issues from their chosen health and safety adviser prior to the submission of and final authorisation of the Educational Visit Plan. The health and safety adviser does not have the power to authorise or stop the activity as this responsibility rests primarily with the EVC and ultimately with the council. If the school intends to go ahead with the activity despite advice from their health and safety adviser, the EVC must notify the Health, Safety and Welfare Section at the council of their intent by phone (confirming the call in writing) prior to the proposed educational place taking place so that the matter and any associated risks can be assessed accordingly and any required action taken.

As the Health and Safety Adviser's contract is with the school, the adviser does not have a duty to inform the council of any issues around disregarded advice but should they wish to do so they should contact the Health, Safety and Welfare Section by email at [hsassistance@iow.gov.uk](mailto:hsassistance@iow.gov.uk).

## **7. INSURANCE**

The Visit Leader must ensure that adequate insurance arrangements remain in place. Additional arrangements may be necessary to obtain insurance cover for activities abroad and activities of a potentially hazardous nature. The Visit Leader must contact the IWC's Insurance Team in good time via email at [insurance@iow.gov.uk](mailto:insurance@iow.gov.uk) to confirm that the necessary cover is in place and is adequate. Copies of all certificates should be included in the Educational Visit Plan.

It should be noted that special insurance conditions apply to certain countries as outlined in appendix 6. If you are contemplating an educational activity in any of these countries please contact the Isle of Wight Council's insurance team for further advice.

## **8. TRANSPORT**

When arranging the hiring of vehicles and drivers, the Visit Leader should check that the company used has appropriate insurance cover by obtaining written confirmation that the insurance policy applies to all people using the vehicle and all activities and journeys that are undertaken.

Privately owned vehicles should not be used unless in an emergency situation. Any staff or volunteers using their own vehicles must provide proof that their vehicle is safe, has a current MOT certificate and road tax, suitable and sufficient seat belts and that their insurance covers them for business use.

Where a minibus is being used and the driver isn't being provided by a professional company then the driver must have an in date valid MiDAS qualification.

All drivers must conform to the Council's work travel safety policy.

## **9. HAZARDOUS ACTIVITIES**

Hazardous activities must be led by appropriately qualified, competent and experienced staff. It is acceptable to use Group Leaders who are not employed by the school, but it is the responsibility of the Visit Leader to ensure that all Group Leaders are checked for competence, experience and their qualifications are verified. All Group Leaders who will be working unsupervised as part of the planned activity must have had an enhanced DBS check done in the last 3 years, and proof of that check should be obtained either directly from the Group Leader if self-employed or in the form of a declaration from the employing company. The declaration should list the employees acting as Group Leaders, date of DBS check and whether any issues were raised on the check.

## **10. VISITS ABROAD**

A Foreign Activities Checklist is available at Appendix 4.

## **11. SUPERVISION RATIOS**

It is important to have a suitable ratio of Group Leaders to pupils for any visit. The recommended ratio should be as follows: EYFS: 1:6, KS1 1:8, KS2 1:12 as a minimum requirement. IWC has decided that this is appropriate guidance. When determining the ratio for a specific activity, consideration should be given to the following factors:

- sex, age and ability of the group
- pupils with a disability / learning difficulty
- nature of activities
- experience of adults in off-site supervision
- duration and nature of journey
- type of any accommodation
- competence of staff, both general and on specific activities
- requirements of the organisation/location to be visited
- competence and behaviour of students
- first aid cover

Where groups include pupils of both sexes, these must be accompanied by both male and female staff, with the following exceptions:

- where an educational visit involves a small group on an activity lasting less than 24 hours, and not involving an overnight stay
- where appropriate adult help is available at the group's venue and only the journey involves the presence of adults of one sex
- where an activity involves pupils working without direct supervision

It is acknowledged that there are occasions when it is appropriate for pupils to work in situations where they are not directly supervised in order to explore, however briefly, a carefully and clearly defined area. In such cases, particular care must be taken to ensure that pupils are appropriately trained, briefed and experienced for whatever is involved.

There must be appropriate emergency procedures and pupils must have the knowledge and ability to use them. Precisely what procedures are necessary depend upon the particular circumstances but these must be considered and agreed prior to undertaking the activity.

NB The school has decided that 'family members or relatives' of Visit Organisers etc may not be used to staff any trips/visit local or otherwise. Family members or relatives of children attending the trip may be considered where there is identified need such as a medical issue or supporting a disability etc. In these cases, authorisation by the Head must be given.

## **12. FIRST AID PROVISION**

Details of first aid provision should form part of the Educational Visit Plan. There are no defined numbers of qualified first aiders that should be available on an activity, although consideration should be given to:

- numbers in the group and the nature of the activity
- likely injuries and how effective first aid would be
- distance to nearest hospital

Whatever decision is made, first aid should be available and accessible at all times.

## **13. ADVENTURE ACTIVITIES USING LICENSED PROVIDERS**

When planning to use adventure activity facilities offered by a commercial company or by a local authority, the group leader should check whether the provider is legally required to hold a licence for the activities it offers and, if so, that the provider actually holds a licence.

A licensed provider does not necessarily have to hold a licence for all its activities. Other activities may be accredited under non-statutory schemes. The provider can give information on what activities are licensed.

It is illegal for a provider of licensable status to offer a licensable activity without a licence. The Adventure Activities Licensing Authority can check on the licence status of a provider. Their contact details are as follows:

Adventure Activities Licensing Authority  
17 Lambourne Crescent  
Llanishen  
Cardiff CF4 5GG

Tel: 01222 755715 Fax: 01222 755757

Web site address: <http://www.aala.org>

#### **14. ADVENTURE ACTIVITIES USING NON-LICENSABLE PROVIDERS**

Not all providers are required to hold a licence. Not holding a licence does not imply a lack of competence or disregard for safety. If proposing to use a non-licensable provider, the Visit leader should ensure that the provider is vetted for any potential health and safety issues. Advice should be taken from the school's health and safety provider.

#### **15. EMERGENCY PROCEDURES**

A senior member of staff should be appointed to act as the group's contact out of school hours. This person should have a copy of the Educational Visit Plan. National Guidance states, and IWC recommends that any emergency procedure should instruct the Group Leaders to:

- establish the nature and extent of the emergency as quickly as possible
- ensure that all the group are safe and looked after
- establish the names of any casualties and get immediate medical attention
- ensure that all group members who need to know are aware of the incident and that all group members are following the emergency procedures
- ensure that casualties are accompanied to hospital by a member of staff
- notify the police if necessary
- notify the British Embassy/Consulate if an emergency occurs abroad
- inform the school contact
- notify insurers
- notify the provider/tour operator
- ascertain telephone numbers for future calls
- write down accurately all relevant facts and witness details and preserve any vital evidence
- Take photographs if possible
- keep a written account of all events, times and contacts after the incident
- complete an accident report form as soon as possible
- no-one in the group should speak to the media
- no-one in the group should discuss legal liability with other parties

The main factors for the school contact to consider include:

- ensuring the group leader is in control of the emergency and establishing if any assistance is required from the school base
- contacting parents and keeping them as well informed as possible at all stages of the emergency
- liaise with the Head Teacher
- the reporting of the incident using appropriate forms if necessary (RIDDOR & Workrite) escalation for significant incidents such as coach, train, airplane crashes, hotel fires, etc.

In the event of an emergency, the Group Leader should contact the school contact. Any emergency situations arising on school's trips can be reported to emergency planning via Wightcare telephone 01983 821105 (24 hours a day, 7 days a week). The school contact, who should normally report the emergency, should ask for the 'Emergency Management Duty Officer.' The emergency planning team will then liaise as necessary with the media, communications, police, emergency services, etc.

# **Appendix 1**

## **'Risk Assessment Step 1'**

Answer all the generic questions **highlighting** the most appropriate answer (read down the columns), add up the total of your answers ( see overleaf), then complete the specific risk assessment form (Step 2) as needed.

	<b>The activity is...</b>	<b>The participants ...</b>	<b>The activity leader ...</b>	<b>The environment is</b>	<b>First aid / emergency support are...</b>	<b>Weather changes...</b>
<b>1</b>	within the everyday experiences of the individuals.	are very experienced with an appropriate level of competency.	is very experienced in leading this activity and qualified at the appropriate level	a local, well known location – urban or rural with predictable hazards.	available at activity site. School and activity staff have appropriate, in date qualifications to suit the activity.	will have no effect on the group.
<b>2</b>	outside the everyday experience of the individual but some tasks have familiar aspects.	are regularly exposed to the activity with an adequate level of competency.	regularly participates in this type of activity but may have minimal qualifications and little leadership experience.	less well known – urban or rural with hazards that could change quickly.	available at activity site. School OR activity staff have appropriate, in date qualifications to suit the activity.	are appropriate to the activity. Any changes will have minimal effect but will not affect safety.
<b>3</b>	outside the everyday experience of the individual but competency has been achieved in training (Evidence of training will be required by EVC)	have some exposure to the activity with experience at a recreational level and some competency.	has had some exposure to the activity as a leader, is a recreational participant and may have only minimal qualifications in this activity.	unfamiliar – potentially complex urban or rural; in the UK, or abroad. OR this is an overnight/ residential visit.	limited, with first aid available at activity site. Emergency support may take an extended time to arrive or access the site.	could lead to problems if the group is not adequately prepared with training and equipment.
<b>4</b>	outside the everyday experience of the individual but training has been given (evidence of training will be required by EVC).	have very occasional exposure to the activity with some experience at an introductory level and limited competency.	has had very occasional experience of the activity as a leader, limited experience as a participant and has no qualifications.	within close proximity to water, cliffs beaches, or other novel hazardous environmental features.	not readily available with limited first aid AND emergency support may take an extended time to arrive or access the site.	could cause serious problems if the group has not achieved a level of competency in the activity or are not adequately equipped.
<b>5</b>	outside the experience of the individual with no training prior to the trip.	are absolute novices with no experience of the activity.	has no experience of the activity in a leadership capacity with some experience as a participant.	in a developing world country, a remote area or an area requiring an advanced leadership/coaching award.	not readily available with no first aid or emergency support readily available at the activity; school or activity staff have no first aid qualifications.	could have serious repercussions for the group.

**Add up the total of your answers – Highlight outcome**

<b>6 – 10 LOW RISK</b>	<b>11 – 19 MEDIUM RISK</b> Evidence will be required to show you have recognised the risk and made provision for control of risk	<b>20 – 25 HIGH RISK</b> Further discussion with EVC is required. Changes will need to be made to lower the overall risk	<b>25 – 30 UNACCEPTABLE RISK</b> Further discussion with Head teacher and EVC to establish why risk is unacceptable. Changes will need to be made to lower the risk
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## **Appendix 2**

### **'Risk Assessment'**

**ISLE OF WIGHT COUNCIL RISK ASSESSMENT RECORD**

WOR/AREA/WORK ACTIVITY COVERED BY ASSESSMENT:

PERSONNEL INVOLVED:  
NON-EMPLOYEES AFFECTED:

ASSESSOR'S NAME:

DATE OF ASSESSMENT:

ITEM NO	HAZARDS IDENTIFIED	RISKS IDENTIFIED	WHO IS AT RISK?	EXISTING PRECAUTIONS	RESPONSIBILITY
1					
2					
3					
4					
5					
6					

**REMEMBER! RISK ASSESSMENT IS A CONTINUOUS PROCESS. ANY SIGNIFICANT CHANGE WILL REQUIRE RE-ASSESSMENT.**

## **Appendix 3**

### **'EV3'**

**Parental/Legal Guardian Consent Form** EV3(i)  
for use by Primary, Middle Schools and Medina House

School/Youth Centre/Project: **Dover Park Primary School**

**Journey/Visit to:**

**Details of Journey:**

I agree to my son/daughter (name)  
(date of birth)  
taking part in the above mentioned visit and, having read the information sheet agree to his/her participation in any or all of the activities described. I acknowledge the need for obedience and responsible behaviour on his/her part.

**Medical Information:**

Does your son/daughter suffer from any condition/allergy, etc. requiring medical treatment, including medication? YES/NO

If yes, please give details

To the best of your knowledge, has your son/daughter been in contact with any contagious or infectious diseases or suffered from anything in the last four weeks that may become contagious or infectious. YES/NO

If YES, please give brief details.

Is your son/daughter allergic to any medication? YES/NO  
If YES, please specify.

Has our son/daughter received a tetanus injection in the last five years? YES/NO

Please give date if known:

**Please outline any special dietary requirements of your child.**

**I undertake to inform the party leader as soon as possible of any change in medical circumstances between the date signed and commencement of the journey.**

*PLEASE COMPLETE AND SIGN THE DECLARATION OVERLEAF*

### DECLARATION

In the unlikely event of my son/daughter withdrawing from the journey I understand that I will be responsible for any costs that cannot be recovered by virtue of the insurance cover provided.

I understand that I am responsible for any damage or injury caused by my son/daughter during his/her time away, except accidental damage or injury, and fully indemnify the organiser of the journey in respect of any financial loss which may be incurred in this way.

I give my unconditional consent to my son/daughter receiving medication as instructed and any emergency dental, medical or surgical treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities present.

**In respect of trips outside the UK, I authorise the group leader to give whatever authority might be necessary should emergency dental, medical or surgical treatment be required by my son/daughter, including anaesthetic or blood transfusion, as considered necessary by the medical authorities present.**

Work telephone number:

Home telephone number:

My home address is:

If not available at above, please contact: **\*(this must be different from the address above)**

Name:

Address:

Telephone:

My family doctor is:

Name:

Address:

Telephone:

Signed (Parent/Legal Guardian)

Date

/

/

*This form or a copy must be taken by the group leader on the activity.  
A copy should be retained by the Home Base Contact*

Revised July 2004

# **Appendix 4**

## **'Foreign Activities Checklist'**

## Foreign Activities Checklist

Language	Main language: Group Leader(s) fluent: Is English a second language?	
Visas	Is the visit to an EU country? Are visas required?	
Legislation	Are there any local restrictions on activities Are there any laws which participants and Group Leaders need to be aware of	
Culture	Are there any cultural issues affecting the trip? Are there any religious issues affecting the trip?	
Food & Drink	Is food and water safe to eat / drink? Is food and water outside of the hotel / residence safe to eat / drink?	
Money	Local currency: Other currencies accepted:	
Telephones	Main mobile network: Compatible UK Networks: Local Emergency number (999):	
Vaccinations	Any specific vaccinations required:	
Insurance	Any personal insurance recommended / essential for participants / Group Leaders:	

Language - It is recommended that at least one member of staff should know enough of the language to hold a basic conversation. It is also advisable for pupils to have a basic knowledge of the local language before the visit.

Visas/Passports - The group leader should ensure that all members of the group hold valid passports and visas (if appropriate).

Foreign Legislation - The group leader needs to check relevant legislation, particularly on health and safety e.g. fire regulations.

Culture - Body language, rules and regulations of behaviour, dress codes, local customs etc. that will be expected and which staff and pupils will need to be aware of.

Food and Drink - Group members should be warned of the dangers of drinking tap water in certain countries. In some countries it is safer to drink bottled water, and care needs to be taken with raw vegetables, salads and unpeeled fruit, raw shellfish, undercooked meat or fish.

Money - How to carry money and valuables discreetly. If larger amounts of money will be needed, it is advisable to take travellers cheques.

Telephones - How to use phones abroad, money required and code for phoning home.

Vaccinations - The group leader should find out whether vaccination is necessary and ensure all members of the group have received it in good time. Check whether the country to be visited requires proof of vaccination.

Insurance - The group leader must ensure that the group has comprehensive travel insurance appropriate to the visit.