

Staffordshire University Academies Trust		Trust Policy Document			
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## Educational Visits Policy

### Policy Statement

Staffordshire University Academies Trust (SUAT) acknowledges the many benefits of learning outside the classroom (LOtC) and is committed to supporting educational visits and activities that enrich the learning opportunities of all children and young people.

This document sets out SUAT's policy on managing off-site activity and learning outside the classroom, and is in place for all SUAT academies.

### Success Indicators

- a) Each Academy shall have their own documented arrangements for Learning Outside the Classroom (LOtC)/Educational Visits which:
  - Outline its expectations of how learning outside the classroom, outdoor learning and off site visits will be managed and
  - Explains the procedural requirements, clarifies the responsibilities of all stakeholders and outlines monitoring arrangements.
- b) Each Academy adopts and works within the Outdoor Education Advisers' Panel (OEAP) National Guidance (NG) and staff with responsibilities in this area have access to this guidance.
- c) Each Academy has appointed an Educational Visits Co-ordinator who is suitably trained, as detailed within this policy document.
- d) Every Academy uses the EVOLVE system to record, approve and manage educational visits.
- e) Staff, volunteers and pupils/students taking part in educational visits have received suitable and sufficient information, instruction and training, appropriate for their responsibilities and level of participation in each visit.
- f) Academies have an emergency plan in place for each educational visit, which is suitable and appropriate for the visit.
- g) Appropriate communication about the educational visit, health and safety information and any emergency arrangements are communicated to all relevant parties such as staff, pupils/students and parents.

### Appendix One – Annual Visits Information

### Appendix Two – Local Area Visits Policy Template

#### 1. Provision of Employer Guidance

SUAT has formally adopted Outdoor Education Advisers' Panel 'National Guidance' (NG) as its guidance for the management of off-site visits and learning outside of the classroom (LOtC). This guidance can be found on the following website: <http://oeapng.info/>

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SUAT's employees must follow the National Guidance of the OEAP, as well as the requirements contained within this policy. This policy outlines the main requirements for LOTC and gives links to appropriate sections of the National Guidance for additional information as required.

Where a SUAT employee commissions a LOTC activity, they must ensure and record that such a commissioned agent has either adopted the National Guidance has systems and procedures in place where the standards are not less than those required by National Guidance.

## 2. Scope and Remit

The NG document and policy Status, Remit and Rationale clarifies the range of employees whose work requires them to use the guidance. In summary, it applies to employees whose work involves any one of the following:

- Direct and remote supervision of young people undertaking experiences beyond the boundary of their normal operational base;
- Direct and remote supervision of young people undertaking experiences that fall within the remit of Learning Outside the Classroom;
- Facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base;
- Deploying staff that will supervise or facilitate experiences of or for young people undertaking experiences beyond the boundary of their normal operational base.

The OEAP guidance applies to most situations where adults acting in the course of their employment take responsibility for children and young people taking part in off-site activities and visits. This policy applies regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods. For further clarification of legal explanations, all users of the guidance are strongly recommended to read the NG document Underpinning Legal Framework (Document 3.2a).

The following terms may all be used to capture this range of ventures, experiences and environments:

- Off-Site Visits
- Outdoor Learning
- Learning Outside the Classroom (LOtC)
- Educational Visits and School Trips
- Residentials
- Expeditions
- Field Studies

The OEAP use the definition: "Any occasion when a child, young person or vulnerable adult takes part in an activity led or organised by their establishment, which is carried out beyond the boundary of the normal operational base, but excepting the following:

- Where establishments operate on a split site

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- Work experience placements
- Physical Education: only the journey to and from the venue is covered by this guidance

The activity supervision should be that required or recommended by specialist PE guidance, such as that provided by the employer and Association for Physical Education (AfPE).

The National Guidance “[Legal framework and employer systems](#)” sets out clear roles and responsibilities for specific staff in Academies. Those involved in managing, approving, assessing and supervising educational visits should be aware of this guidance.

The National Guidance also sets out requirements and recommendations for roles within Staffordshire County Council including:

- Director of Children’s Services and Lead Member(s) for Children’s Services.
- Line manager of an Outdoor Education Adviser (or equivalent post).
- Outdoor Education Adviser.
- Advisers (other than an OEA), including Health & Safety Officer.
- Manager of an outdoor centre.

### Consent

Academies must seek written consent for children to attend an educational visit from parents with Parental Responsibility. The OEAP provides confirmation of when to seek consent, [here](#).

The OEAP Guidance states:

Parental consent is needed for all off-site visits and activities organised by nursery schools. All establishments should obtain consent for any activity which is perceived to involve a higher level of risk, such as a visit involving a long journey or adventure activity. Otherwise, establishments that children attend as part of their day-to-day education or training need to obtain consent only for visits taking place outside the establishment’s normal hours.

Consent is not required for children to participate in off-site activities (such as local studies and visits to a museum or library) that take place during the establishment’s normal hours and which are a part of its secular curriculum (Education Act 2002 section 29). While parents do not have the option to withdraw their child from the curriculum, except for religious or sex education, it is good practice to inform them that a visit or activity is to take place; it is strongly recommended that SUAT Academies do this.

Asking for consent when it is not needed can lead to some parents assuming they can withhold consent and so withdraw their child from a curriculum visit when this is not the case. In addition to gaining consent for participation in certain visits, it may be necessary to ask parents for other consent, such as:

- Consent for children to receive emergency medical treatment, including administration of an anaesthetic or blood transfusion, in the event of an emergency when parents cannot be contacted;
- Consent for the establishment to share personal data such as contact details, medical and behavioural information with third-party providers (under the terms of the establishment’s privacy policy);
- Consent for the use of photographs of children by the establishment or by any provider;
- Agreement to any financial or other terms and conditions.

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### 3. Communication and Training

Academies are required to ensure that their employees are provided with:

- Appropriate guidance relating to educational visits and LOtC activity;
- Access to training courses to support the guidance to ensure that it is understood;
- Suitable systems and processes to ensure that those trained are kept updated;
- Access to advice, support and further training from appointed advisers that have proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

The appropriate guidance for the management of outdoor learning and LOtC in Staffordshire is the Outdoor Education Adviser’s Panel ‘National Guidance’ website, the address of which is given in section 1.

The relevant training courses in Staffordshire are:

- Staffordshire Educational Visits Coordinator (EVC) Training – all Staffordshire schools are required to have a current trained EVC in post, with revalidation on a three yearly basis as a minimum. **This is mandatory training.**
- Staffordshire Visit Leader Training – this course **is strongly recommended** for all those who lead LOtC activities and educational visits.

For the purposes of the day to day updating of information, Staffordshire EVCs, Visit Leaders and Head Teachers are directed to the posting of updates (which include information on how to access the relevant courses) available on EVOLVE.

Where an employee experiences problems with finding the material they are looking for, or require clarification or further help and guidance, they should contact their establishment’s Educational Visits Coordinator (EVC) in the first instance.

Academies should ensure that the relevant qualifications of those who are attending are uploaded to Evolve, for example, first aid, minibus training, visit leader training, educational visits coordinator certification.

Further help and guidance can be obtained through the Trust’s Operations Manager, by contacting [hkirksam@suatrust.co.uk](mailto:hkirksam@suatrust.co.uk) and the Educational Visits team who are best contacted by e-mail at [eva@entrust-ed.co.uk](mailto:eva@entrust-ed.co.uk). The nominated advisers in Staffordshire are Gareth Lloyd 07794 331637 / [gareth.lloyd@entrust-ed.co.uk](mailto:gareth.lloyd@entrust-ed.co.uk) and Stu Meese 07784 230453 / [stu.meese@entrust-ed.co.uk](mailto:stu.meese@entrust-ed.co.uk).

### 4. Approval and Notification of Activities and Visits

SUAT uses an online system (EVOLVE) for uploading visit planning and risk management information for notification and approval by appropriate parties. **It is essential that both the EVC and the Head Teacher/Principal approve all visits on Evolve prior to the commencement of the visit.** It is the responsibility of the Visit Lead and approving persons to ensure that appropriate risk management, supervisory and emergency documentation is in place for such visits, for the safety and wellbeing of those partaking in the visit.

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A key feature of this system is that the risk management documentation associated with visits and LOtC activities can also be approved by the EVA (Educational Visits Advisor). Visits which are classed as adventurous activities, based abroad or are residential must be approved by the EVA prior to commencement. Those visits and activities not requiring EVA approval may still be viewed, sampled or monitored using the database and diary facilities of the system.

It is a requirement that all SUAT Academies use the EVOLVE system; for further advice and help using the system please use the information (i) buttons and help pages provided throughout the system. For further assistance, please contact the Educational Visits team using the contact details given in Section 3.

The recommended timescales for submitting visits for approval on Evolve are detailed as follows. It is essential that Evolve forms are submitted with sufficient time for them to be assessed and reviewed before approval, for any required adjustments to be made to the form and for the changes to be communicated with the parties involved in the visit.

Timescales for Academies				Entrust EVA Teams
	VL creates	EVC	HEAD	ENTRUST
Local & Regular	1/2 Term	2 Weeks	1 Week	NOT REQUIRED
Local & Additional Risk	1 Term	5 Weeks	4 Weeks	3 weeks
Residential UK	1 Term	6 Weeks	5 Weeks	4 Weeks
Foreign	1 Year - 2 Terms	10 Weeks	8 Weeks	6 Weeks
<b>If your visit doesn't fit these descriptors, contact the EVA team to discuss.</b>				

The category of adventurous on the Evolve system includes all additional risk activities, notwithstanding the list below. If staff are in any doubt as to the activity being classed as adventurous, please seek the advice of the Academy's EVC or contact Gareth or Stu at Entrust for advice. The below list is current as of the policy review date. An up to date list of adventurous visits will be maintained on Evolve, therefore Academies should also review this at the start of planning their visit, to establish the approval timescales and level of risk management required.

These risks would not usually be found inside the school gates; this list applied equally to school-led activities as it does provider-led ones:

- An overseas visit.
- A residential or overnight stay (at home or abroad).
- An adventurous activity.
- Multi Activities, including those delivered by an external provider
- Abseiling

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- Air Activities, excluding commercial flying
- Armed Forces Providers
- Open & Wild Country activities as defined by DofE
- Camping
- Caving, including mine exploration but excluding public show caves
- Paddlesport activities including canoeing, kayaking, stand-up paddle boarding, foil
- Cycling – road
- Coasteering / Coast Scrambling / Sea level traverse
- Duke of Edinburgh Award preparations, expeditions and training including all forms of journey
- High-level Ropes Courses, including Zip Lines
- Hill Walking and Mountaineering and additional risk terrain
- Horse Riding and Equine care
- Motorsport, all forms, including Karting and Quad trekking
- Mountain Biking and off-road trails
- BMX and Skateparks
- Rafting/Improvised Rafting
- River / Gorge Walk / Scramble
- Rock Climbing, including natural rock, man-made, indoor or outdoor walls
- Sailing / Windsurfing/Foil
- Kite surfing/buggy/board
- Shooting including air, clay, laser tag sports, paintball and airsoft
- Archery target, field and clout and other target sports, excluding soft
- Wintersports
- Skiing - Indoor and dry slope
- Snowboarding, tube and sledge - Indoor and dry slopes
- Ice Skating
- Snorkelling and aqualung diving
- Surfing, bodyboarding and skimboarding
- Swimming in all forms, excluding UK Public Pools
- Use of powered safety craft/jets skis
- Water skiing, wakeboarding
- Trampoline parks
- Adventure Parks, Assault Courses, Challenge Courses
- Inflatable parks
- Water margin activities – ROSPA defined
- Waterparks/ Aqua parks
- Fieldwork in Coastal, River and upland locations
- And any other activity which has additional risks

This notification includes any activities being delivered by external providers or approved competent establishment leaders, even those who hold the required NGB qualifications. The NG provides clear advice regarding the assessment of leader competence. All leaders and their assistants must be formally assessed as competent to undertake the responsibilities they have been assigned in line with NG. For general visits, it is the responsibility of the Academy, Headteacher or person delegated

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to approve visits to ensure that competency checks have been made to ensure the visit leaders and assistants can plan, deliver and supervise educational visits effectively and safely.

## 5. Risk Management

There is a legal duty to ensure that risks are managed by Academies during educational visits, requiring them to be reduced to an 'acceptable' or 'tolerable' level, and not to eliminate risks, as would be a reasonable expectation when risk assessing a piece of machinery, workshop or manufacturing process. This requires that proportionate (suitable and sufficient) risk management systems are in place, requiring Academies to provide such support, training and resources to its employees as is necessary to implement this policy.

**Academies must create and then communicate (with participants) their own risk assessments for a visit / LoTC. Obtaining risk assessments from the venue or provider alone is not sufficient.**

The person responsible for risk managing the visit is required to:

- Have the [skills, status and competence needed for the job](#)
- Understand the risks involved
- Be familiar with the activity

Plans should be proportionate and sensible, focusing on how to manage genuine risks.

Suitable and sufficient risk management systems must be in place as part of planning for educational visits. The risk management of an activity should be informed by the benefits to be gained from participating. SUAT strongly recommends a 'risk-benefit assessment' approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. This appreciation of the benefits to be gained through participating provides objectivity to a decision that any residual risk (i.e. the risk remaining after control measures have been put into place) is 'acceptable'. HSE endorse this approach through their 'Principles of Sensible Risk Management' and advocate that it is important that young people are exposed to well managed risks so that they learn how to manage risk for themselves.

There is no legal requirement to produce a risk assessment in a particular format; but there is a legal requirement for the process to be recorded and for suitable and sufficient control measures to be identified and implemented. SUAT has made available risk management templates and documentation to support academies in the planning and risk management of educational visits and LOtC. All documentation is based on guidance provided by the OEAP.

The results of any risk assessment must be communicated to all staff, participants, parents and pupils as appropriate. Templates and examples of risk management materials can also be accessed through EVOLVE and training is provided during the Entrust EVC and VL courses. Entrust EVC training also ensures that establishments are supplied with the knowledge to support the process of planning and risk managing educational visits; risk management materials provided by Entrust can be accessed through EVOLVE.

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For regular visits such as weekly swimming or sporting fixtures, a blanket form may be completed on EVOLVE to cover all visits. It is recommended that these are done on a termly basis and all the details on there must be shared with any staff, volunteers, participants involved. This should be used where the regular visit doesn't fall under the criteria for a Local Area Visit or where the Academy does not have Local Area Visits activated on Evolve.

For PE activities, only the journey to and from the venue is covered by OEAP guidance. The organisation of the activity itself should be as required or recommended by specialist PE guidance, such as the Association for Physical Education (AfPE). Risk assessments for such activities must still be uploaded to EVOLVE to record that risk management strategies were implemented for such activities.

Forms can be used to cover regular visits in the local area such as visits to local places of worship, libraries and local parks, or, Academies may use their Local Area Visits Policy and risk manage the visit via the Local Area Visits section on Evolve (where the particular visit meets Local Area Visits criteria); further details are contained in Appendices One and Two of this Policy.

The Local Area Visits section on Evolve will only be activated where Academies can demonstrate that they have a current Local Area Visits Policy which has been approved by Entrust, and must follow Entrust's Local Area Visits guidance.

It is important that risk management documentation is reviewed periodically following repeat visits, to ensure that it remains suitable and sufficient for the duration. Documentation should be adapted following any changes, accidents or incidents and uploaded to EVOLVE. New or adapted documentation must also be shared with staff and others involved in the activity.

For further information, please refer to the NG document: [Risk Management Overview \(Document 4.3c,f,g\)](#).

## 6. Emergency Planning and Critical Incident Support

Each Academy must have a clear Emergency Plan in place to deal with Critical Incidents during visits and LOtC. Please refer to the NG document which discusses all aspects which should be considered when devising this plan: [Good Practice- Critical Incident Managements \(Section 4 Documents\)](#).

A critical incident includes where any member of a group undertaking an off-site activity has:

- Suffered a life threatening injury or fatality;
- Is at serious risk;
- Been missing for a significant and unacceptable period.

All members of the Academy including visit staff, leadership team and Local Academy Council must be aware of this plan and how to implement it.

The Emergency Plan should aim to:

- Meet the needs of the group in crisis;
- Meet the needs of the school's community - parents, staff, relatives and friends;
- Respond to the needs of other agencies;



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- Respond to media demands.

The details of the Emergency Plan will depend upon the type of visit, on its circumstances and capacity. An Emergency Plan should be comprehensive, setting out the roles and responsibilities of all those who may have to contribute to the management of an emergency. It should explain the roles to be filled rather than assign named staff to a them (as individual staff may be unavailable at the time of the incident). Guidance for each role should allow any suitable staff to pick up the task and be effective.

When developing the plan, it is good practice to:

- Recognise that a climate of support and trust among staff will strengthen the response at a time of crisis;
- Devote a staff meeting or part of a staff development session to the plan - this should happen in the initial stages and again once the plan is complete;
- Identify key staff - being involved in an emergency can be very demanding, and it is important to ensure that the staff selected for this role are competent and able to function and make sound decisions in an unexpected and stressful situation;
- Recognise that any particular member of staff might not be available at the time of an emergency, or might be limited because of commitments such as childcare;
- Provide appropriate training;
- Develop checklists, crib cards, etc. to support staff during an emergency;
- Recognise that there may be a need for support, and identify ways of obtaining it e.g. the emergency services, the Local Authority, Trust colleagues, counsellors, social services, insurers, legal advice);
- It is highly likely that alternative/additional telephone lines will be needed during an Emergency or Critical Incident – one or more spare mobile phones could be kept for this purpose (kept charged and checked regularly to ensure that they are active and have sufficient credit).

The Emergency Plan should include a checklist to prompt those managing the emergency about practical actions they may need to take, and how to go about them, for example:

- Calling the emergency services;
- Informing parents;
- Informing the Academy and Trust;
- Informing senior managers;
- Sending staff to the scene of the incident to support the group if safe to do so;
- Arranging food/drink/shelter/accommodation/transport as necessary;
- Making emergency funds available;
- Addressing any safeguarding issues, and alerting social services if necessary;
- Arranging counselling;
- Informing insurers;
- Practical arrangements for the group travelling back to base and being reunited with parents etc.

Academy staff must ensure that they are able to immediately access the following emergency contact information during the course of their visit:

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- Head Teacher / Principal
- Educational Visits Coordinator
- Any additional Academy emergency contacts
- Parent/carer contact information
- Emergency services
- SUAT
- Embassy (where relevant)
- Tour operator (where relevant)
- Insurance (where relevant)
- Staffordshire County Council (where relevant)

Contact lists should be readily accessible in more than one place:

- Keep them in hard copy as well as electronically, unless electronic systems are robust enough to cope with loss of power and internet;
- Have a record of where lists are kept so that any changes are made to all copies;
- Have a robust system for keeping records of the names and other details of staff and participants and staff taking part in every visit, including medical information and emergency contact details of parents/next-of-kin (these should be available to the Visit Leadership Team, the Emergency Contacts and establishment managers);
- Ensure that all personal data, including names, telephone numbers and addresses, are held and processed securely – see document 4.4j "Participant Information and Data Protection".

In the event of an emergency, in the first instance the Academy should refer to its Visit Emergency Plan and Business Continuity Plan. Academies should also contact SUAT, SCC and the EVA where relevant.

The emergency contact phone number for SUAT staff outside office hours is contained within the Business Continuity Plan.

The 24 hour emergency number for SCC is **07623 910065**. In the unlikely event that the SCC Director on call does not respond within a reasonable time period, then contact should be made with the Staffordshire Civil Contingencies Unit's Duty Officer. This can be done by calling **08451 213322**. This number will put individuals through to Fire Control and therefore individuals should ask Fire Control to page the CCU Duty Officer, leaving an appropriate message.

Please note that calls to the numbers above are to be used only in extreme circumstances, such as serious injuries and/or fatalities. This provision is not for resolving matters such as lost passports, lost luggage and forgotten items such as medication.

Emergency contact numbers should be carried by leaders at all times during an off-site activity. These numbers must not be given to young people or to their parents or guardians, who will have designated points of contact via the Academy.

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## 7. Assessment of Leader Competence

NG provides clear advice regarding the assessment of leader competence. It is an expectation of that all SUAT leaders and their assistants have been formally assessed as competent to undertake such responsibilities as they have been assigned in line with NG, by each Academy.

For educational visits which fall into the adventurous or additional risk activities category, leaders should have additional NGB qualifications to allow them to lead effectively. These qualifications must be added to the leader’s Evolve profile as evidence of competence. In addition, Academies must consider what recent experience and CPD the leader has undertaken to allow them to lead the visits effectively and safely.

The leader must only lead within the remit of their qualification. Leaders will also be required to complete an Activity Leader Form outlining this information as part of the Evolve form completion. These will automatically open in Evolve once the leader has designated the visit as “Adventurous led by staff” on the visit type section on the Visit form. For further information, please refer to the NG Document 3.d Approval of leaders: <https://oeapng.info/download/1084/>

Proof of leader competence should be uploaded to the Academy’s Evolve system.

For further information please refer to NG document Assessment of Competence and section 4 of this policy.

## 8. Role-specific Requirements and Recommendations

The NG sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within SUAT management structures. For further information please refer to NG document ‘Legal Framework and Employer Systems.’

NG sets out clear and detailed responsibilities and functions of specific roles that relate to roles within most Academy establishments which include:

- Local Academy Councils (governors)
- Headteachers and Managers
- Educational Visits Coordinator (EVC)
- Visit and Activity Leaders
- Assistant Leaders
- Volunteer helpers
- Those in a position of parental authority

For further information please refer to NG document ‘Requirements and Recommendations for Establishments.’

All Academies that carry out educational visits are required to have a trained EVC in post. EVC’s must attend revalidation training periodically (every 3 years as a minimum) and appropriate systems should be in place to ensure EVC’s stay up to date with best practice and legal requirements. In addition to attending a training course, an EVC should have prior experience of leading educational visits or have support from other establishment employees who are experienced in leading LOTC.

Where an employee regularly leads educational visits Visit Leader (VL) training is strongly recommended.

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Training courses are available through Entrust and are delivered by the Entrust Educational Visits Advisor (EVA) who is an endorsed OEAP trainer.

The NG provides clear advice regarding the assessment of leader competence. All leaders and their assistants must be formally assessed as competent to undertake the responsibilities they have been assigned in line with NG. For general visits, it is the responsibility of the Academy, Headteacher or person delegated to approve visits to ensure that competency checks have been made to ensure the visit leaders and assistants can plan, deliver and supervise educational visits effectively and safely.

The relevant qualifications of those attending Educational Visit should be uploaded to Evolve.

For educational visits which fall into the adventurous or additional risk activities category, should have additional NGB qualifications to allow them to lead effectively. Please see section 4 for further information.

## 9. Charges for Off-Site Activities and Visits and Consent

SUAT Academies must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449-462 of the Education Act 1996.

OEAP Guidance states the following principles:

Schools and local authorities must not charge for:

- Education provided during school hours
- Education provided outside school hours if it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education
- Transport provided in connection with any educational visit of this type
- Supply teachers to cover for teachers who are away from school on a visit.

It should be noted that 'part of the National Curriculum' is not restricted to learning outside the classroom experiences that are specifically subject based but includes, for example, activities designed to fulfil requirements under the National Curriculum 'inclusion statement'.

Schools and local authorities may charge for optional extras, which include:

- Education provided outside of school time that is not: a) Part of the National Curriculum; b) Part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school; c) Part of religious education.
- Board and lodging for a pupil on a residential visit, except to parents in receipt of certain benefits (broadly equivalent to those that qualify children for Free School Meals).
- Extended day services offered to pupils (e.g. activity clubs) and employer systems folder schools must inform parents on low incomes and in receipt of relevant benefits of the support available to them when they ask for contributions.

For further information please refer to NG document Charges for Off-Site Activity.

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## 10. Vetting and DBS checks

SUAT employees who work *frequently* or *intensively* with or have *regular access* to young people or vulnerable adults, must undergo an enhanced DBS check as part of their recruitment process.

Individuals who engage in regulated activity with young people or vulnerable adults must undergo an enhanced DBS check, with barred list check, as part of their recruitment process. It is the responsibility of the Academy engaging the individual to decide if a particular role falls within the legal definition of regulated activity. The full definition of regulated activity is found in Schedule 4 of the Safeguarding Vulnerable Groups Act 2006 as amended by the Protection of Freedoms Act 2012, and is also detailed within Keeping Children Safe in Education documentation. An individual can become engaged in regulated activity either through what they do (a defined activity) or where they work (a specified place).

A DBS check (and other vetting procedures) in itself is no guarantee as to the suitability of an adult to work with any given group of young or vulnerable people. In addition, any safeguarding policies and procedures, (including the current Keeping Children Safe in Education guidance) in place at the Academy, must be followed. Visit and LOtC risk assessments should detail control measures and arrangements for safeguarding during visits, including plans for supervision.

The placement of an adult within a situation of professional trust (where young people could be vulnerable to physical or mental exploitation or grooming) should always be on the understanding that a common-sense risk-benefit assessment process has been considered.

The placement of an adult in a situation of professional trust with young or vulnerable people must always be subject to a robust engagement process as well as a DBS check where appropriate.

Depending on the level of responsibility being placed upon the employee or volunteer, this might include some or all of the following elements:

- References
- Interview
- Induction
- Training
- Supervision
- Monitoring

Visit Leaders must be aware that it is not reasonable to expect that all employees of a third party provider, who may come into contact with children, will be checked for criminal records. Under the DBS regime there are clear limits to who can be subjected to which level of checking. As third party providers will not usually be 'specified establishments' then they will only be able to check those staff or volunteers who are involved in one of the defined activities and this may well not involve ancillary staff. Providers should still, of course, have in place a robust recruitment and engagement system for all their staff and volunteers.

For further information please refer to NG document Vetting and DBS Checks.

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## 11. Requirements to Ensure Effective Supervision

The law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is ‘effective’.

Effective supervision should be determined by a proper consideration of:

- Age (including the developmental age) of the group;
- Gender and gender considerations/issues;
- Ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics etc.);
- Nature and location of the activity (including the type of activity, duration, skill levels involved, as well as the time of year and prevailing conditions);
- Staff experience and competence.

The Early Years Foundation Stage (EYFS) Statutory Framework sets out legal minimum ratios for all providers working with children aged up to five. The appropriate ratio during an outing is always likely to be higher than the legal minimum: as with other age groups, this must also be determined by risk assessment, which should be reviewed before each outing. It is not unusual for a ratio of 1:1 to be necessary.

When considering and calculating ratios for groups, the Academy must ensure that there is sufficient competent staff to effectively supervise the group during all aspects of the visit. Staff from external visit providers must not be included in the supervision ratios as they may not be present for the whole visit.

There should be a sound plan to manage the potential issues involved with staff managing mixed sex groups, including the needs for privacy, safeguarding and pastoral support. See OEAP National Guidance document 6q “FAQ – Staff Supervising Mixed-Sex Groups”.

When using external providers, they hold the responsibility for delivering the activity and ensuring the safe delivery of that activity. Academy staff are required to supervise in a pastoral capacity during these periods. For periods such as downtime, transport and any other periods when pupils/students are not directly instructed by the provider, the direct supervision of the pupils/students becomes the responsibility of the Academy staff so clear and effective supervision plans must be in place, documented and understood by all parties.

Staffing ratios are a risk management issue and should be determined through the process of risk assessment. It is not possible to set down definitive staff/participant ratios for a particular age group or activity. Some guidance documents do set out ratios, but these should be regarded as starting points for consideration rather than being definitive, as they may be appropriate only where the activity is relatively straightforward and the group has no special requirements.

Staffing, especially for visits to remote locations or overseas, should take into account how the group will be supervised effectively given the possibility of a leader becoming indisposed or having to leave the group, for example, to accompany a sick child to hospital, and staff who are supporting a child on a one to one basis.

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In some cases, there may be only one leader on a visit, or on a particular activity during a visit. If this is the case, young people (or any adult helpers) should be competent to manage in the event of the leader being taken ill or injured and should, as a minimum, know what to do to contact the establishment and get support.

A useful framework for assessing requirements for ratios and effective supervision is SAGE. See OEAP National Guidance document 1b “Foundations”:

- Staffing: who is needed/available? The plan must work within the limits of available numbers, abilities and experience.
- Activities to be undertaken: what do you want the group to do and what is possible?
- Group characteristics: prior experience, abilities, behaviour and maturity, sex, any specific individual needs.
- Environment: indoors or out; a public space or restricted access; urban, rural or remote; quiet or crowded; within the establishment grounds, close to the establishment or at a distance; and the ease of communications between the group and base. Do not overlook environments to be passed through between venues. For residential visits consider the accommodation and surrounding area. For outdoor environments, consider remoteness, the impact of weather, water levels and ground conditions. Consider the implications of current guidance about avoiding infection during an epidemic.

Alcohol consumption on educational visits is not permitted - by staff or students. This must be written down and shared with all parties such as the Academy, staff, providers, students and parents. All parties should agree to this procedure. It is essential that staff can maintain effective supervision at all times and that the laws regarding alcohol consumption in the country visited are followed.

For further information please refer to NG documents:

Ratios and Effective Supervision

Group Management and Supervision

3.2d “Approval of Leaders”

4.1a “Avoiding Accidents and Emergencies”

4.2a “Group Management and Supervision”:

4.4b “First Aid”;

4.4i “Special Educational Needs and Disabilities”;

4.4k “Coronavirus”.

## 12. Preliminary Visits and Provider Assurances

All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group expectations and requirements, including safeguarding and health and safety. Such information gathering is essential in assessing the requirements for effective supervision of young people. It is a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. If this is not possible then the use of brochures, websites and previous knowledge from past visits or other establishments should be considered. Academy arrangements should clarify when preliminary visits are required along with any information required from the provider.

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Academy arrangements should clarify the circumstances where a preliminary visit is a requirement. If this is not possible then the use of brochures, websites and previous knowledge from past visits or other establishments should be considered. Academy arrangements should clarify when preliminary visits are required along with any information required from the provider. It is good practice for visit leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available.

It is good practice for Visit Leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available. Examples of such schemes include:

- Learning Outside the Classroom (LOtC) Quality Badge
- Adventure Activities Licensing Service (AALS) licensing
- Adventuremark
- National governing body (NGB) centre approval schemes (applicable where the provision is a single, specialist activity)
- AHOEC Gold Standard

### Selecting External Providers and Facilities

When providing visits with additional risk activities, it is the responsibility of the school to fully inform the parents of the nature of the visit, any activities that may take place along with associated risks; this will allow parents to give informed consent to allow their child to participate.

### Non Accredited Providers

Use of non-accredited providers is possible for some adventurous and additional risk activities as some of these activities do not fall within the above accreditation schemes. If activities that are being provided fall within the scope of AALS licensing, then the provider used must have a licence. If they do not fall within this scheme, the providers are required to complete an Activity Provider Checklist. This must be completed and signed by the provider and added to the EVOLVE visit form.

A new Activity Providers Checklist is not required for each visit as long as the information on the form refers to the activity being carried out. If the provider has not been used within 6 months, then they should be contacted to see if the information on the Activity Providers Checklist is still correct. The Activity Provider Checklist can be downloaded from the Key Resources section on the homepage of Evolve. These forms must not be completed or signed by school staff.  
<https://oeapng.info/download/4431/> 4.4g

If an Academy is using a provider for residential accommodation including campsites, then the provider must complete an Accommodation Provider form.

Both Activity Provider and Accommodation Provider forms can be downloaded from the Visit Form Section in the Resources Tab on EVOLVE, which contains the most up to date versions (dated 2023).

### Collaborative Provision

Visits that are the responsibility of SUAT Academies will be staffed by at least one appropriate representative who will fulfil the role of leader. This will always apply to participants under 14 years. The exception to this is on the occasion when education for the 14-19 year old age range may be conducted for individuals or small groups by appropriate provider organisations without close



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supervision from an Academy leader. In order to ensure that the provider organisation is appropriate and both Academy and the provider are fully aware of their responsibilities the Academy should follow the Collaborative Provision for the 14-19 Curriculum guidance available on NG.

Before any provider is used to deliver collaborative provision, the Academy must ensure that the provider is appropriately vetted and that a contract or service level agreement (SLA) is in place, which clearly lays down the minimum required operating standards. This contract or SLA should include the arrangements for any outdoor learning, off-site visits or learning outside the classroom. It should require providers to either comply with the policy and procedures for outdoor learning used by the home establishment, or to demonstrate that their policies and procedures covering this area are equally robust.

Academies using an outside organisation to provide an activity must check they have appropriate safety standards and liability insurance.

The Council for Learning Outside the Classroom (LOtC) awards the [Learning Outside the Classroom Quality Badge](#) to organisations who meet nationally recognised standards. Academies can [check if an organisation holds the LOtC Quality Badge](#).

If an organisation does not hold the badge, the Academies must check that they're an appropriate organisation to use. This could include checking:

- Their insurance
- That they meet legal requirements
- Their health and safety and emergency policies
- Their risk assessments
- Control measures
- Their use of vehicles
- Staff competence
- Safeguarding
- Accommodation
- Any sub-contracting arrangements they have
- That they have a licence where needed

The Academy should have an agreement with them that makes it clear what everyone is responsible for. This is especially important if they'll be supporting the supervision of the children.

### Adventurous Activities

For adventure activities such as caving, climbing, trekking, and water sports (as detailed in the list above), these should be identified and risk assessed as part of the visit beforehand. **Staff managing or leading visits must not decide to add such activities during the trip** and must always consider the abilities of the children when assessing risk. All activities must be risk managed and the risk management documentation communicated to parties attending, in advance of the visit, in writing.

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Organisations need a licence to provide some adventurous activities and organisations who hold the LOtC Quality Badge should hold a licence for the activity they provide. [Find out more about licensing](#) on the Health and Safety Executive (HSE) website.

When planning water sports, academies must consider the need for the following, and factor this into their risk management approach:

- Instructors
- Lifeguards

Academies should take particular care when using hotel swimming pools and other water leisure activities which may not have a trained lifeguard. The Outdoor Education Advisers' Panel (OEAP) provides advice when undertaking adventure specialist activities, including swimming.

### Visits Abroad

Visits abroad can have extra risks and need a higher level of risk assessment. Academies should make sure any organisation that is providing activities holds the LOtC Quality badge or similar local accreditation.

The HSE does not cover incidents overseas, however, it can investigate work done in Britain to support the trip, such as risk assessments. Academy staff could also be liable under civil law for any injuries to the children due to negligence.

If the trip includes risks such as challenging terrain, going to remote places or extreme climates, the guide to the British Standard for adventurous activities outside the United Kingdom should be referred to as the basis for the planning and risk assessment. Organisations employed by the Academy should follow this too. If they have an LOtC Quality Badge then they will also follow this standard.

Academies should consider the Foreign and Commonwealth Office's detailed guidance on [safer adventure travel and volunteering overseas](#) when organising adventure visits abroad. [Foreign travel advice](#) is also available.

For further information please refer to NG document Preliminary Visits and Provider Assurances.

### 13. Insurance for Off-site Activities and Visits

Employer's Liability insurance is a statutory requirement and SUAT holds a policy that indemnifies it against all claims for compensation for bodily injury suffered by any person employed by it where negligence attaches. This cover should extend to those persons who are acting in a voluntary capacity as assistant supervisors. SUAT also holds Public Liability insurance, indemnifying it against claims for compensation for bodily injury from persons not in its employ, as well as for the accidental loss of, or damage caused to, property where negligence attaches. Employees (as agents of the employer) are indemnified against such claims, as are voluntary helpers acting under the direction of the employer's staff. The indemnity covers activities such as off-site activities and visits organised by all establishments and settings for which the employer is responsible.

Visit leaders may consider taking out less limited personal accident cover privately or obtain cover through a professional association.

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When providers are used it is a requirement for them to hold Public Liability insurance cover with a minimum limit of indemnity of £5M.

For further information please refer to NG document Insurance.

For further information and advice on insurance matters please contact:

SUAT Operations Manager  
Email [hkirkham@suatrust.co.uk](mailto:hkirkham@suatrust.co.uk)

#### 14. Inclusion and Equality

Every effort should be made to ensure that outdoor learning activities and educational visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender or religion. If a visit needs to cater for young people with special needs, every reasonable effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

Academies should take all reasonably practicable measures to include all young people. The principles of inclusion should be promoted and addressed for all visits and reflected in policy/procedures, thus ensuring an aspiration towards:

- An entitlement to participate
- Accessibility through direct or realistic adaptation or modification
- Integration through participation with peers

It is essential that Academies implement suitable risk management measures to ensure that pupils/students who have medical conditions, allergies and additional or complex needs can safely participate in LOtC. Such measures must be documented and communicated to staff attending. This may be inclusive of documents such as an individual risk assessment, care plan, EHCP.

For further information please refer to NG document Inclusion.

#### 15. Good Practice Requirements

To be deemed competent, a SUAT Visit Leader, or Assistant Visit Leader must be able to demonstrate the ability to operate to the current standards of recognised good practice for that role.

All staff and helpers must be competent to carry out their defined roles and responsibilities.

NG sets a clear standard to which SUAT leaders **must** work. The guidance states:

*'A competent Visit/Activity Leader (or an Assistant Leader where they may take sole responsibility for a sub-group) requires:*

- *Knowledge and understanding of their employer's guidance supported by establishment-led training.*

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- *Knowledge and understanding of establishment procedures supported by a structured induction process specified by the establishment.*
- *Knowledge and understanding of the group, the staff, the activity and the venue.*
- *Appropriate experience.*
- *In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification.*

Staff participating in off-site activities and visits must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with the above guidance. It is particularly important that careful consideration of competence issues is applied to staff attending. Academies should view the original documents and certificates when verifying leader's qualifications, and not rely on photocopies.

Where a volunteer helper is a parent (or otherwise in a close relationship to a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise the Visit Leader's plans for group management. The Visit Leader should directly address this issue as part of the risk-benefit assessment. Similarly, it is good practice for the home contact not to be related to (or otherwise in a close relationship to) any of the young people or staff taking part in the visit.

An Academy must always get written consent for nursery age children. For children over nursery age, parents should be informed with written consent provided as required, especially for visits which:

- Need a higher level of risk assessment
- Are outside normal school hours

Parents should be given the opportunity to withdraw their child from a visit, and also provide up to date medical or dietary information prior to the visit taking place.

For further information please refer to NG document Good Practice Basics.

## 16. Transport

Providing transport for off-site activities and educational visits must be an integral part of the planning process, therefore careful thought must be given to planning arrangements. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it and Academies must follow the specialist guidance provided in SUAT's Vehicles Policy. All national and local regulatory requirements must be followed, too.

It is a legal requirement that the driver and all passengers wear a seat belt. The driver is responsible for ensuring that children under the age of 14 wear their belts.

It is a legal requirement for transport companies to have a Transport Manager. Academies should ascertain whether the company they plan to use has a Transport Manager.

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## Hire of Transport

The visit leader should ensure that coaches, buses and other such transport are hired from a reputable company.

The following are ways of providing some assurance of suitability:

- Does your establishment have an existing, satisfactory relationship with a provider? Do not underestimate intuition – if your establishment has used a provider before and always felt safe, listened to and well cared for then this is a good reason to use them again.
- Can the operator cope with any special needs your group may have?
- Are the seat belts appropriate for your group and is there, if necessary, appropriate access and securing facilities for a wheelchair?
- Where a provider has a fleet of coaches of varying ages and standards, confirm the specific standard or vehicle you require.
- Ensure the chosen coach company will not subcontract to another company without your agreement.
- Do not select on price but on value. Price should only become a factor when deciding between very similar or identical offers.

Further research could include:

Use of the government website [www.gov.uk/find-vehicle-operators](http://www.gov.uk/find-vehicle-operators) to check that the provider has a valid Public Service Vehicle Licence – this will show how many vehicles the provider can operate at any one time and whether they are licensed only for national use in the UK, or for international travel.

Ask for copies of the Operator's Vehicle, Public Liability and Employer's Liability Insurances and for confirmation that:

- Drivers are correctly licensed and have DBS checks;
- The provider has a specific health and safety risk assessment for group travel with young people;
- Drivers have received training to operate with groups of young people;
- Drivers have an emergency procedure to follow;
- There is a 24/7 helpline for the duration of your journey;
- Coaches are equipped with basic safety equipment (first aid and functioning torches);
- Vehicles undergo four weekly safety checks;
- If travelling abroad, confirm that the driver is experienced in international driving and the countries to be visited.

In driving a coach in all the expected conditions (examples might be mountain roads and fitting and using snow chains);

- Check if the provider has any external accreditation or audit, e.g. CoachMarque, Guild of British Coach Operators, BUSK Benchmark, Road Operators Safety Council (ROSCO) 'Safe Driver Awards', Freight Transport Association (FTA) audits or inspections - these can be useful indicators of a professional approach to safety standards;
- Check reviews from previous customers to see which other establishments use the company and what has their experience been;

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- Ask for a copy of the provider’s current Operator Compliance Risk Score (OCRS), which the company can obtain from the Driver and Vehicle Standards Agency (DVSA) (the scores are based on data from vehicle tests and roadside inspections collected over a three-year rolling period and are colour coded red (highest risk), amber or green (lowest risk));
- Ask the provider to confirm the first time pass rate in their vehicles’ annual tests (they can provide this information from DVSA’s online system) - in 2014-15 the annual first time pass rate for public service vehicles was 83.5% and you should be looking for something better than this;
- Question the operator about back up: i.e. what support is available should the coach allocated to you be unserviceable or unacceptable on the day, or you have an incident on the journey;
- Check the age of the coaches and whether they are compliant with UN ECE regulation 66 regarding the strength of the coach roof;
- If possible visit the provider’s depot, look at their coach fleet and get a feel for how they do things - ask if you can look at their records of vehicle safety checks and audits.

Once a provider is selected, it is good practice to liaise with them over the following, which will be documented and communicated as part of the visit’s approach to risk management:

- Pick up and drop off points;
- Choice of route and timings;
- Planned stops;
- How any special needs will be met;
- The respective responsibilities of the driver and the leadership team;
- Expected behaviour standards and coach ‘rules’.

The Academy must risk assess transport for educational visits and document this. Attaching a copy of the coach company’s risk assessment is not sufficient.

### Minibus (Academy Driver)

When Academy staff are driving minibuses, they must have a valid Driving Licence, Minibus Assessment and Medical Assessment, and be verified as competent by the Academy. Please refer to the SUAT ‘Vehicles Policy’ for further information.

The level of supervision necessary should be considered as part of the risk management process when planning the journey, giving proper consideration to issues of driver-distraction when considering what supervision is required for the specific group of passengers being transported. Transport by minibus must be risk assessed.

The driver of any vehicle cannot safely drive and supervise passengers at the same time. Therefore, a judgement should be made about the likely behaviour and individual needs of the passengers. If any of the passengers may require close supervision, one or more responsible adults should travel

in the vehicle as escort(s), so that the driver is not distracted. In determining the staffing necessary to ensure effective supervision, Academy should consider the factors that might influence the safety of the driver and passengers. These factors include:

- The length of the journey and time of day when it takes place;
- The route and the familiarity of the driver with this route;

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- The nature of the group (e.g. age/maturity/special needs/behavioural issues) and the level of behaviour management or support they are likely to require during the journey;
- The seating arrangements (including whether there should be adults seated next to emergency exits);
- The need to ensure that all passengers wear seat belts;
- The overall workload of the driver during the day (other responsibilities and duties undertaken or planned by drivers).

Minibus drivers must hold a category D1 or D entitlement on their licence. Drivers whose licence shows a D1 entitlement because they obtained their licence before 1997 have a category 101 restriction on their entitlement. This means that they may not drive for Hire or Reward, unless they are driving under a Section 19 Permit.

Minibus drivers must:

- Understand that they are legally responsible for the condition of the vehicle, including compliance with requirements for carrying safety equipment (e.g. fire extinguisher, warning triangle, first aid kit, reflective jackets);
- Check the vehicle before using it, and record such checks;
- Ensure that they meet the driver licensing requirements;
- Ensure that the vehicle is not overloaded, and that the total weight does not exceed the vehicle's Maximum Authorised Mass (MAM);
- Comply with their employer's and establishment's policy requirements;
- Use a tachograph if required to do so (e.g. driving in Europe; driving for Hire or Reward in the UK without a Section 19 Permit);
- Not drive when taking medication or undergoing treatment that might affect their ability or judgment;
- Know what to do in an emergency, including how to use firefighting and first-aid equipment;
- Avoid driving for long periods and ensure that rests are taken when needed (see below);
- Comply with transport regulations and the requirements of the vehicle's insurance cover;
- Have regular medical checks including eyesight tests;
- Observe minibus speed limits, which are generally lower than those for a car (see [www.gov.uk/speed-limits](http://www.gov.uk/speed-limits)).

An employee driving with a Section 19 Permit in the UK must comply with UK Domestic Regulations, unless they drive for less than 4 hours per day in any week:

- Driving is defined as "being at the controls of a vehicle for the purposes of controlling its movement, whether it is moving or stationary with the engine running, even for a short period of time";
- In any working day, the maximum amount of driving is 10 hours;
- After 5.5 hours of driving a break of at least 30 minutes must be taken, during which the driver is able to obtain rest and refreshment;
- Alternatively, within any period of 8.5 hours in the working day, total breaks amounting to at least 45 minutes must be taken so that the driver does not drive for more than 7 hours and 45
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minutes, and the driver must in addition have a break of at least 30 minutes to obtain rest or refreshment at the end of this period, unless it is the end of the working day.

If the driver is leaving the party to collect them at a later time or date, the journey that the driver takes back must also be risk managed, including emergencies.

### Private Cars

Transporting people in private cars must form part of the planning and risk assessment process and where this occurs, there must be recorded procedures. It is the Academy's responsibility to ensure that the appropriate checks have been made on both the driver's experience and qualifications and that the vehicle to be used has the appropriate level of insurance, road tax and a valid MOT.

OEAP Guidance states that:

*Establishments that organise transport in private cars have a legal duty of care and may be liable in the event of a claim following an incident. They should ensure that:*

- *If the driver is not an employee, they are engaged as a volunteer (or paid contractor) through the establishment's normal procedures.*
- *The driver properly understands their duty of care and any agreed responsibilities for supervision.*
- *Parents are informed about the transport arrangements.*
- *Evidence is obtained that:*
  - *The vehicle is safe. This means that it holds a valid MOT certificate, where relevant, that the driver certifies it has been serviced in line with the manufacturer's schedule, and that the driver carries out any pre-use checks specified by the manufacturer.*
  - *The driver is suitable. This means that they hold a valid licence for the type of vehicle and meet any employer requirements.*
  - *There is a valid insurance policy covering the driver and the vehicle for the intended use. This may require that the driver has 'business use' cover. Tax and MOT status can be checked at [www.vehicleenquiry.service.gov.uk](http://www.vehicleenquiry.service.gov.uk). Driver licence details can be checked at [www.gov.uk/check-driving-information](http://www.gov.uk/check-driving-information) if the driver provides a check code (from [www.gov.uk/view-driving-licence](http://www.gov.uk/view-driving-licence)).*

*It is advisable for establishments to keep evidence of these checks having been carried out. It is reasonable to obtain information about roadworthiness, driving licences and insurance by asking the driver to complete and sign a form which asks for specific information. The same form can be used to inform the driver (and owner) about what is expected of them, and to make clear that they are using the vehicle at their own risk. Establishments should reserve the right to ask for documents to be produced for monitoring purposes.*

*Consideration must be given to the potential distraction of the driver and the supervision of the passengers. So a judgement should be made about the likely behaviour and individual needs of the passengers. If any of them may require close supervision, then another adult should travel in the*

*vehicle so that the driver is not distracted or compromised. Very careful consideration should be given before allowing a driver to be alone with a child or young person, as this could leave both of*



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them vulnerable. Circumstances where this might be acceptable include the following, when there is no reasonable alternative:

- Where the transport arrangements have been planned based on a risk assessment, which shows that their benefits outweigh the risks.
- In an emergency or other unforeseen circumstances where the child or young person would otherwise be at greater risk.

### Parents Providing Transport

Sometimes parents are asked to help with transport to a venue. When this happens, establishments should be clear which of the following applies:

- Parents are being asked to volunteer as drivers, as part of the Academy's transport arrangements for the visit. If this is the case then the drivers should be engaged as volunteers and the considerations above should be applied.
- Parents are being asked to organise transport, which may involve some parents providing lifts for children other than their own. If this is the case then the Academy must make clear that it will not be involved in making these arrangements and will not have any responsibility for them.

Where parents are being asked to organise their own transport, the Academy should consider the need for:

- Information from parents about what arrangements have been made.
- Communication with parents, in case of delays or 'no shows'
- Clear handover of supervision from and to parents at the venue, depending upon the age of the children and other relevant factors
- The provision by the Academy of transport for any children whose parents are unable to make such arrangements.

### Young People Driving

Young and inexperienced drivers are more likely to be involved in accidents. Where parents are being asked to organise transport for young people who may be offered lifts by young friends, Academies must advise parents to consider this carefully before allowing it. Where a sixth form works with young people over the age of 17, it is likely that some young people will want to drive each other to venues, whether the establishment has organised transport or not. Academies must have clear procedures which deal with this situation.

Please refer to NG documents:

Transport (General Considerations)

Transport (Minibuses)

Transport (Private Cars)

Transport (Hiring a Coach)

### 17. Monitoring

Academies must ensure that any procedures in place to manage educational visits and LOtC are effectively monitored. SCC will check that off-site visit arrangements are in place through the Health, Safety and Wellbeing Audit process, however, the main monitoring role within academies is delegated to Headteachers/Managers and their EVCs.

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Academies and their EVCs must ensure that appropriate systems are in place for monitoring offsite visits. Monitoring should include checks on procedures, training, reviews following visits and sampling (field observation), to check that procedures are followed during visits. Records of any monitoring including field monitoring carried out by the Academy should be retained by the Academy.

Once a visit has taken place, Academies should upload monitoring information to Evolve or complete the monitoring section on Evolve.

Periodic sampling and monitoring is also undertaken by SUAT, and reports shall be shared with the Trust Board in support of the employer's obligations for the health, safety and welfare of staff and those attending educational visits.

Further information on monitoring is available in the National Guidance documents:  
<http://oeapng.info/downloads/legal-framework-and-employer-systems>.

## 18. Planning and Evaluation

Planning should reflect the consideration of legal and good practice requirements, ensuring:

- The plan is based on Academy procedures, policies and National Guidance.
- All staff (including any adult volunteer helpers) and the young people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk management process.
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained.
- Proportionate assurances have been obtained from any providers (making full use of national schemes that accredit that assurances have already been obtained by credible inspection regimes).
- Designated emergency contact(s) have been identified that will work on a 24/7 basis where required.
- All details of the activity provision are accessible to the emergency contact throughout the period of the activity.

The Ofsted report 'Learning Outside the Classroom – How Far Should You Go?' (October 2008) makes statements in the strongest terms to support the value of LOtC, including the fact that it raises achievement. SUAT Head Teachers/Principals, Managers, EVCs and Visit Leaders are recommended to familiarise themselves with the main content of this report.

Academies must include a short evaluation of their visit on Evolve, following return, and record whether any accidents or incidents took place during the visit.

For further information please refer to NG documents on Policies, Planning and Evaluation.

## 19. Accident Reporting and First Aid

All accidents that involve anyone – employees, pupils, students, contractors or members of the public – on SUAT premises or anywhere else when engaged in SUAT activities are to be handled in

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line with SUAT Accident procedures. Accident investigation and report forms are available by accessing the Staffordshire My Health and Safety System and Trust website. Any accidents/incidents which take place during educational visits and LOtC must be suitably reported and investigated.

First aid training must be appropriate for the activity and environment the group are operating in. Any staff who are leading adventurous and additional risk activities must have valid and relevant first aid training, which is also required in order to validate any National Governing Body (NGB) qualifications they may hold.

The Health & Safety (First Aid) Regulations 1981 state: “An employer shall provide or ensure that there are provided, such equipment and facilities as are adequate and appropriate in the circumstances for enabling first aid to be rendered to their employees if they are injured or become ill at work”. This same principle should be applied to the children and young people in the care of an Academy. The provision of first aid during off-site visits and activities must therefore be considered as part of the risk-benefit assessment and planning process. Academies should have in place an assessment to determine their first aid provision on site. Off-site provision is simply an extension of this. The determination of the appropriate requirements should take into account:

- The nature of the activity;
- The nature of the group;
- The likely injuries associated with the activity;
- The extent to which the group will be isolated from the support of the emergency services (both in terms of distance and response time).

For children in the Early Years Foundation Stage (EYFS), there is a statutory requirement that at least one person who has a current paediatric first aid certificate and sufficient understanding and use of English to summon help in an emergency must accompany children on outings.

Where a group of young people is subject to remote supervision (for example during a Duke of Edinburgh Award expedition), then the supervisor must ensure that the group has:

- The ability to contact qualified first aid support;
- An appropriate level of competence and first aid materials to look after themselves until help arrives.

It is a legal requirement that all public service vehicles, including minibuses, must carry a first aid kit.

Visit planning must consider the needs of any participant who might require emergency medication as part of a first aid response. See also document 4.4d “Medication” from the OEAP. Any participant at risk of anaphylaxis who has been prescribed adrenaline autoinjectors should carry two with them during a visit. Where a young person at known risk of anaphylaxis accompanies a visit, the leadership team should be familiar with the Department of Health “Guidance on the use of adrenaline autoinjectors in schools” available at

[www.gov.uk/government/publications/usingemergency-adrenaline-auto-injectors-in-schools](http://www.gov.uk/government/publications/usingemergency-adrenaline-auto-injectors-in-schools).

Any participant with asthma who has been prescribed a reliever inhaler should have it with them during a visit. Academies are allowed to buy, without prescription, salbutamol asthma reliever

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inhalers and adrenaline auto-injectors. These 'spare' devices should not be seen as a replacement for a young person's own medication but as an emergency backup. It is important to ensure that

any medication and related devices (such as inhalers and adrenaline auto-injectors) are within their expiry date.

When using a provider, checks should be made regarding the level of first aid provision.

For visits either abroad or some distance from the Academy, visit leaders must ensure they know the location of additional first aid assistance and how to summon it if required. This must be part of the planning and emergency procedures process. Guidance can be found at: <http://oeapng.info/downloads/good-practice>

## 20. Health and Safety Service Supporting Information

Policies and Procedures for:

- Risk Assessment
- Accident and Incident Management
- First Aid
- Vehicles and Minibus Driving
- Business Continuity Planning
- EVOLVE

### Appendix One – Annual Visits Policy

**This should be used where the visit is a regular visit but does not meet the criteria for the Local Area Visit Policy, or where the Local Area Visit module is not activated for a particular Academy.**

#### Annual Visit Form Policy

It is possible to create 'annual visit forms' for certain types of trips, reducing unnecessary repetition. Weekly sports fixtures are a good example of when this type of visit is beneficial.

Although some of the detail, i.e. attendee numbers, may not be exactly as the original visit form, many details will be the same. If there are substantial differences new documents or text can be added to the original visit form or a new form can be created for that particular visit.

#### Guidance on completing relevant sections:

**Visit Name** - Annual Sports Fixture 2022-2023.

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**Visit Dates** - Important that **only two** dates are entered. The **first** and **last** date of the academic year. It should be documented as to what dates the visits are taking place.

**Destination** – Select a relevant option from Evolve i.e. local area/Staffordshire schools.

**Travel Arrangements** – Select **all** that are likely to be used during the year.

**Staffing** – Select **all** staff likely to accompany any visits during the year, staff can also be added at a later stage, or notes reflecting changes can be added.

**Attendees** – Select numbers based on an average for the type of trip.

Staffing and attendees must be documented for each visit.

**Attachments** – Attach **all relevant** risk benefit forms. If any specific risk benefit forms are required they can be added, when necessary, to the visit form. Any additional documentation or notes can be added at any time throughout the year to the visit form.

## **Appendix Two Local Area Visits Policy**

Academies wishing to risk manage their Local Area Visits via the designated LAV module must have a detailed Local Area Visits Policy in place. There is a template policy document that Academies should use to prepare their policy, as below. Academies may enter their visits onto the LAV module, where this meets the criteria for a Local Area Visit, as defined within the ‘scope’ below.

### **Local Area Visits Policy**

This document has been prepared in accordance with:

<https://www.gov.uk/government/publications/health-and-safety-on-educational-visits/health-and-safety-on-educational-visits>

<https://oeapng.info/download/1184/> - OEAP NG 5.3b How to write an establishment visit policy.

<https://oeapng.info/download/1144/> - OEAP NG 4.3c Risk management – an Overview

### **Scope**

This policy applies to visits/activities within the ‘Local Learning Area’ which are part of the normal curriculum, take place during the normal school day, are within the local area and can be accessed without the need for hired transport.

If the activity is not curriculum based or beyond the school day, then full planning, consent and approval will be needed as for any other day visit. Visits which require transport beyond the control of the Academy e.g. walking / cycling / Academy minibus providing transport for visits in the local area, will be outside of the scope of the Local Area Visits Policy.

Visits/activities within the Local Learning Area can follow the Operating Procedure below. This must be sufficiently detailed to permit risks associated with LAV to be managed.

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These visits/activities:

- Must be recorded on EVOLVE via the 'Local Area Visit' module.
- Do not require parental consent, but state how parents are to be informed in advance, in writing, e.g. via a slip sent home). Families should be fully informed and up to date with Local Learning Activities.
- Require risk assessing but do not normally need any additional risk assessments / notes (other than following the Operating Procedure below).
- Require staff to be engaged and part of regular reviews of the risk management measures involved with Local Area Visits. Risk management that is dynamic during visits should be documented post visit. Documentation must match the reality of the visit!

### Boundaries

The boundaries of the Local Learning Area are shown on the attached map. This area includes, but is not limited to, the following frequently used venues:

e.g.

- Stoneydown Park
- Stoneydown Library
- Hampden Pool and Leisure Centre
- The Concorde Shopping Mall
- Hampden Forest, up to the boundary with Forest Road
- Town Swimming pool, etc.

### 'No-go' areas within the Boundaries

e.g.

- Stanley Street on market days
- The public conveniences in Stoneydown Park
- The road crossing at north end of High Street (use footbridge opposite library)

**Please ensure that this information is clearly documented on the map.**

### Transport to and from the Local Learning Area

The methods of transport must be wholly in the control of the Academy in order for the LAV Policy to apply, such as establishment minibus, walking or cycling. If using an outside provider, Academies should revert to the full visit form.

There should be a risk assessment in place for the mode of transport. Please use this section to detail transport arrangements and risk management information for the mode/s of transport chosen (or attach copies of the risk assessment/s for the mode/s of transport). Travel routes should be recorded on maps and included within this document.

### Local Learning Area LLA

#### Operating Procedure

(The below is simply a generic risk assessment for these routine activities and could be placed into a table similar to the general risk assessment template. Academies should detail their own risks and risk management measures in this section).

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**The following are potentially significant issues/hazards within our Local Learning Area:**

- Road traffic, road crossing.
- Other people / members of the public / animals.
- Losing a pupil / student / group separation.
- The needs of the group.
- Supervision.
- Uneven surfaces and slips, trips, and falls.
- Weather conditions.
- First aid.
- Emergency procedures.
- Third parties.
- Activity specific issues when doing fieldwork (nettles, brambles, rubbish, etc).
- **Add anything else specifically relating to your Local Learning Area.**

**These are managed by a combination of the following:**

- The Head, **Deputy or EVC (delete as necessary according to your circumstances)** must give approval before a group leaves.
- Only staff judged competent to supervise groups in this environment are approved. A current list of approved staff is maintained by the EVC and office, and is uploaded to Evolve.  
**Consider Visit Leader training for these staff / detail whether they are trained.**
- The concept and Operating Procedure of the 'Local Learning Area' is explained to all new parents when their child joins the school, and a synopsis is in the School Prospectus.
- There will be a minimum of two adults. The number of staff attending the visit will be risk assessed and managed on the basis of the needs of the group, as per the SAGE process, and in consideration of how the Academy would respond and continue to effectively supervise the group in the case of an emergency. **This statement is probably appropriate for all primary schools. Decisions should be based on the area and the age / maturity of the pupils - the key determinant will always be 'what would the pupils do if the only adult collapsed?' Follow the supervision guidance in the Educational Visits Policy.**
- Staff are familiar with the area, including any 'no-go' areas, and have practiced appropriate group management techniques.
- Pupils have been trained and have practiced standard techniques for road crossings in a group.  
**For primary schools this is easy to do with some simple road markings in the playground – with a little practice this can become drilled and slick, as everyone knows what is going to happen.**
- Where appropriate, pupils are fully briefed on what to do if they become separated from the group.  
**This needs a decision and will depend on the area you are in – return to school, wait where they are, go to x and ask for help, etc.)**
- All remotely supervised work in the Local Learning Area is done in 'buddy' pairs as a minimum.
- Pupils' clothing and footwear is checked for appropriateness prior to leaving school.
- Staff are aware of any relevant pupil medical information and ensure that any required medication is available.
- Staff will record the activity on EVOLVE (Local Area Visit module) and leave a completed 'Signing out' sheet with the office. **Amend as necessary.**
- At least one sufficiently charged mobile is taken with each group and the office have a note of the number.
- Individuals know how to access first aid, travel first aid kits are taken.

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- Staff are aware of any relevant pupil medical information and ensure that any required medication is available.
- Appropriate personal protective equipment is taken when needed (e.g. gloves).
- Application of the Behaviour Policy.

If you have a local issue, e.g., with drug needles, etc, in any area, then you can mark that bit as no-go, or add here how you will educate the pupils to deal with it – it is their home after all, so they need to be able to cope with it!

### IMPORTANT

**PLUS**, you must add any specifics relating to your local area, e.g.:

- When crossing Bimble Street, only the crossing by Baguette the Bakers must be used.
- Where indirect supervision takes place at Vestry Museum, the meeting point will be the seating area in the main concourse. There must always be a member of staff there.
- Pupils must be informed that they are not allowed to use the vending machines at Hamden Leisure Centre.

### First Aid Policy for LLA

As Local Learning Areas are close, contactable, and easily reached, a minimal first aider policy based on the Academy’s existing procedures and the likely activities undertaken, should be sufficient. First aid arrangements should be documented in this policy.

### Review Period for the Local Learning Area

The review period for the local Learning Area must be termly in the first year (to account for seasonal variations and learning) with regular contributions and updates from the visit leader team as they dynamically risk assess new elements.

### Monitoring for the Local Learning Area

The Head, EVC or their delegate should provide a monitoring visit initially once a term then regularly thereafter.

This policy will be shared with all stakeholders, including pupils, staff, families and LACs. Academies may consider adding the policy to the school website, so families (and OFSTED) are aware.