



# **Policy and Guidance for Educational Visits and Learning Outside the Classroom**

**Incorporating the “National Guidance” from the  
Outdoor Education Advisers Panel**

**Adopted by Ward End Governing Body 2025**

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## **Foreword**

We welcome the 'Policy and Guidance for Educational Visits and Learning Outside the Classroom' for all teachers, youth workers and other educational professionals working with young people in Birmingham.

The Policy and Guidance is important to the health, safety and wellbeing of our young people. It offers unique opportunities to enrich learning, enhance their personal and social development, gain greater awareness of different environments and adopt healthy lifestyles.

The Council has responsibility for public health and this Policy and Guidance supports the long-term preventative strategy, which is designed to improve the life chances and aspirations of our young people.

Committed and experienced practitioners from across the Council initially created this Policy and Guidance. We hope that you will all find it indispensable in enhancing your work for the benefit of the young people of Birmingham.

## **Education Safety Services**

## **Introduction**

'To reach their potential, children and young people need experiences which broaden their horizons, enrich their cultural experience and understanding and improve their well-being.'

This policy and guidance clarify the systems in place for supporting 'Educational Visits' and 'Learning Outside the Classroom' in Birmingham. This is a valuable resource for schools and other settings working with children and young people. Underpinning this policy is a comprehensive national web-based resource.

It is essential that qualified competent staff can lead and undertake these activities and experiences safely, carefully weighing up the benefits against the risks. Training is provided for the Council through the Birmingham City Council's Education Safety Services. Training supports positive outcomes as well as giving professionals the confidence to take part in these activities with their young people. Appropriate courses are outlined within this policy and guidance document.

<b>DOCUMENT STATUS:</b>	Birmingham City Council (BCC) Policy and Guidance
<b>EFFECTIVE FROM: NEXT REVIEW:</b>	April 2022; First published October 2014; Next review March 2023
<b>RELATED DOCUMENTS:</b>	Outdoor Education Advisers Panel National Guidance for the Management of Outdoor Learning, Off-site Visits and Learning Outside the Classroom (reviewed and updated on regular basis) <a href="https://oeapng.info">https://oeapng.info</a>
	Department for Education DfE Guidance Health and Safety on Educational Visits November 2018: <a href="https://www.gov.uk/government/publications/health-and-safety-on-educational-visits/health-and-safety-on-educational-visits">https://www.gov.uk/government/publications/health-and-safety-on-educational-visits/health-and-safety-on-educational-visits</a> Health and Safety: Responsibilities and Duties for Schools (July 21) <a href="https://www.gov.uk/government/publications/health-and-safety-advice-for-schools/responsibilities-and-duties-for-schools">https://www.gov.uk/government/publications/health-and-safety-advice-for-schools/responsibilities-and-duties-for-schools</a>
	Department for Education DfE: Schools Coronavirus (COVID-19) Operational Guidance <a href="https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1057106/220224_Schools_guidance.pdf">https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1057106/220224_Schools_guidance.pdf</a> Note This is under constant review)
	Health and Safety Executive HSE 2011 School Trips and Outdoor Learning Activities: Tackling the health and safety myths. <a href="https://www.hse.gov.uk/services/education/school-trips.pdf">https://www.hse.gov.uk/services/education/school-trips.pdf</a>
	BCC Guidance - Critical Incidents Management; Guidance for Schools latest update. <a href="https://www.birmingham.gov.uk/downloads/file/1405/critical_incident_management_guidance_for_schools">https://www.birmingham.gov.uk/downloads/file/1405/critical_incident_management_guidance_for_schools</a>
<b>SUPERSEDED DOCUMENTS:</b>	DfE Guidance 1998 – Health and Safety of Pupils on Educational Visits (HASPEV) and Part 1, 2, & 3 supplements DfE Guidance 2001 – Health and Safety: Responsibility and Powers
<b>AUDIENCE:</b>	Head Teachers, Principals and Managers of Schools; all other educational settings; other private, voluntary or independent establishments and those that are commissioned by BCC
	Educational Visit Co-ordinators (EVCs)
	Visit Leaders / Assistant Leaders
	Governing bodies
	Local Authority Officers – Birmingham City Council: <ul style="list-style-type: none"> <li>• Education and Skills Directorate</li> <li>• All other directorates with related educational settings</li> <li>• Safety Services</li> <li>• School and Governor Services</li> <li>• Legal and Insurance Sections</li> <li>• Emergency Planning and Critical Incident Support</li> </ul>

# Policy and Guidance for Educational Visits and Learning Outside the Classroom

## 1. Provision of Employer Guidance

Birmingham City Council (“the Council”) has formally adopted the *“Outdoor Education Advisers Panel National Guidance for the Management of Outdoor Learning, Off-site Visits and Learning Outside the Classroom”*. This guidance can be found on the following web site:

<https://oeapng.info>

This does not preclude schools implementing alternative arrangements based on local circumstances and outcome of risk benefit analysis.

***Anybody involved in educational visits and learning outside the classroom is strongly advised to read this policy before seeking information from the <https://oeapng.info> website.***

It is a legal expectation that employees **must** work within the requirements of their employer’s policy and guidance. Birmingham City Council (BCC) employees must follow the requirements of ‘Outdoor Education Advisers Panel National Guidance’, as well as the requirements of this document. **All maintained schools must produce a policy that makes this clear.**

Another employer such as the governing body of a Voluntary Aided school or Academy Trust may wish to opt into the Council’s policy and guidance including systems and processes for supporting and monitoring educational visits and learning outside the classroom activities. Where they do, **they must produce a policy statement that makes this clear.**

Where a Council employee commissions an educational visit or learning outside the classroom activity, they must ensure that the provider has either:

1. Adopted the Council Policy and Guidance and the OEAP National Guidance

**Or**

2. Have systems and procedures in place where the standards are as robust as those required by the OEAP National Guidance.

## 2. Scope and Remit

The OEAP National Guidance document: 1c *“Status and Remit and Rationale”* <https://oeapng.info/download/1046/> 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 supervision of children and young people undertaking experiences beyond the boundary of their normal classroom or environment;

- Direct supervision of children and young people undertaking experiences that fall within the remit of learning outside the classroom;
- Facilitating experiences for children and young people undertaking experiences beyond the boundary of their normal classroom or environment;
- Deploying staff who will supervise or facilitate experiences for children and young people undertaking experiences beyond the boundary of their normal environment;
- This guidance may be applicable for all those supervising vulnerable adults as there is a transfer of good practice for the wider use of educational visits.

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

For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the OEAP National Guidance documents:

3.2a ***“Underpinning Legal Framework and Duty of Care”*** <https://oeapnq.info/download/1078/>

3.1a ***“Requirements and Recommendations for Employers”*** <https://oeapnq.info/download/1074/>

### **3. Ensuring Understanding of Basic Legal Requirements**

As an employer, the Council is required to ensure that its employees are provided with [This also applies to other employers who opt into this policy and guidance]:

- Access to appropriate guidance relating to educational visits and learning outside the classroom activity;
- Access to appropriate 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 accredited advisers who have proven expertise and professional understanding of the guidance.

The relevant training courses are:

1. Educational Visit Coordinator (EVC) Training - all Birmingham schools; academies; other educational establishments; and other private, voluntary or independent establishments; i.e. those working in partnership with BCC are required to have a current trained EVC in post. If an establishment does not delegate the responsibility for educational visits and learning outside the classroom to a nominated trained EVC, then that role will rest with the Head Teacher / Principal / or Manager of the establishment by default. The Head Teacher/ Principal / Manager should therefore undertake EVC training.

2. Educational Visit Coordinator (EVC) Revalidation - all Birmingham schools; academies; other educational establishments; and other private, voluntary or independent establishments; i.e. those working in partnership with BCC are required to ensure that their EVC undertakes a revalidation every three years.
3. Visit Leader Training – this course is ***strongly recommended*** for all those who lead learning outside the classroom activities. To meet OEAP National Guidance requirements regarding leader competence, leaders must be current in their knowledge of expectations of good practice; therefore, update refresher training is also strongly recommended. Schools and other educational establishments may find training for visit leaders can more successfully be delivered to whole staff on training days. This training may be accommodated on request. Additional and specific visit leader training and workshops are also available.

For further information on how to access EVC and Visit Leader Training contact Education Safety Services at [schoolsafety@birmingham.gov.uk](mailto:schoolsafety@birmingham.gov.uk) or contact an Adviser.

Website: <http://www.birminghameducationsupportservices.co.uk/> to book online.

For the purposes of day-to-day updating of information, Birmingham EVCs and Visit / Activity Leaders are directed to the posting of 'School's Notice Board'. There is an Educational Support Services on-line service where relevant information can be obtained. <http://www.birminghameducationsupportservices.co.uk/> (and section 21)

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), or the nominated Educational Visits/Outdoor Learning Advisers (See section 23)

#### **4. Approvals and Notification of Activities and Visits**

The EVC / Head Teacher / Manager is responsible for approving each visit. Where school's / establishment's policies delegate these responsibilities and functions to others, this must be clear. This is important for the formal notification and approval processes.

Approval in principle should be sought from the EVC / Head Teacher/ Manager as soon as possible before any financial commitment is made. Schools / Establishment policies will differ; organisers should check procedures and give adequate notice.

Birmingham uses a system of notification for all visits involving adventurous activities; all visits to 'wild country', Duke of Edinburgh Award expeditions (refer to section 16) and Overseas visits. These visits **must** be notified to the Council using eVisit (Educational Visits On-line Notification System), which is a web-based educational visit planning, management and notification system. These are overseas and adventurous activities delivered by an external provider or by staff within the establishment. Non-adventurous activities do not require notification e.g. visits to any museum, local parks, the theatre or theme parks. – Please contact the Education Visits Adviser if you are not sure.

*Visits requiring notification to the Council should be submitted at least 4 weeks prior to the day of the visit wherever possible. However, in the case of complex visits such as expeditions abroad support should be sought from Educational Visits Advisers at least 6 months in advance of the visit.*

All BCC maintained schools and schools buying the education visits package from School Safety, now have access to the eVisit electronic management system through their Education Visit Coordinators. If Education Visit Coordinator's require assistance to access or use eVisit, then they should contact School Safety.

The link to eVisit is: <https://www.e-visit.co.uk/BCCschoolsafety/eVisit>

## 5. Risk Management

The employer has a legal duty to ensure that risks are managed - requiring them to be reduced to an "acceptable" or "tolerable" level. This requires that suitable and sufficient risk management systems are in place, requiring the employer to provide such support, training and resources to its employees as is necessary to implement this policy.

The risk management of an activity should be informed by the benefits to be gained from participating. The Council 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. The Health and Safety Executive (HSE) has core guidance on managing risks <https://www.hse.gov.uk/simple-health-safety/risk/index.htm> and

Managing Risk and Risk Assessment at Work and School Trips and Outdoor Learning Activities <https://www.hse.gov.uk/services/education/school-trips.pdf>

The HSE 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 a requirement for the risk assessment process to be recorded and for suitable and sufficient control measures to be identified for any significant risks i.e. those that may cause serious harm to individuals. EVC Training ensures that establishments are supplied with electronic generic risk-benefit assessments for educational visits and learning outside the classroom. Further exemplar event-specific assessments, risk management materials and advice are available by contacting an Educational Visits Adviser.

It is strongly recommended that establishments adopt and adapt these materials to ease the burden of bureaucracy that might otherwise discourage leaders from making full use of learning outside the classroom learning opportunities.

Refer to OEAP National Guidance documents:

4.3c "**Risk Management – an overview**" <https://oeapnq.info/download/1144/>

4.3f "**Risk Management – some practical advice**" <https://oeapnq.info/download/2681/>

4.3g "**Risk Management- what to record and how**" <https://oeapnq.info/download/2684/>

## 6. Emergency Planning and Critical Incident Support

There are a hierarchy of Emergencies divided into 4 categories dependent on the nature of the visit.

**Incident** – Dealt with by the visit leadership team

**Emergency** – An incident or event that overwhelms the coping mechanisms of the visit leadership team and requires the schools' / academies' emergency plan for offsite visits to be initiated

**Critical Incident** – An incident or event that overwhelms the coping mechanism of the visit leadership team as well as the schools' / academies' emergency plan. This requires the councils / employers critical plan in addition to the schools' / academies' emergency plan to be initiated.

**Major Incident** – Declared by the Police who would take control with the relevant local authorities. If outside the UK the relevant authorities will take control.

A critical incident is an incident where any member of a group undertaking an educational visit or learning outside the classroom activity has either:

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

Schools must have emergency planning procedures in place. Every visit leader and assistant leader must be familiar with emergency planning procedures and reporting mechanism. This forms part of the training delivered to EVCs and visit leaders.

Relevant emergency contact telephone numbers should be carried by leaders at all times during an offsite educational visit but should only be used in the case of a genuine emergency. Under no circumstances should these telephone numbers be given to young people or to their parents or carers.

To activate support from the Council, please refer to section 22, page 21.

Refer to OEAP National Guidance documents: Section 4 including:

4.1c "***Emergencies and Critical Incidents – Guidance for Leaders***"

<http://oeapng.info/download/1136/>

4.1d "***Emergencies and Critical Incidents – Guidance for Establishments***"

<http://oeapng.info/download/4713/>

4.1e "***Emergencies and Critical Incidents – Guidance for Employers***"

<http://oeapng.info/download/4741/>

4.1b "***Emergencies and Critical Incidents – Overview***" <http://oeapng.info/download/4697/>

## **7. Monitoring and Quality Assurance**

Schools and other education settings should ensure that there is sample monitoring of educational visits and learning outside the classroom activities undertaken. Such monitoring should be in keeping with the recommendations of OEAP National Guidance. There is a clear

expectation that the monitoring function is a delegated task, principally carried out through systems put in place by the EVC and Senior leadership Team.

The council will however monitor compliance.

Refer to OEAP National Guidance document:

3.2b **“Monitoring”** <http://oeapng.info/download/1080/>

## **8. Assessment of Leader Competence and Good Practice Requirements**

OEAP National Guidance provides clear advice regarding the assessment of leader competence and key roles. It is an expectation of the Council Policy and Guidance that all leaders and their assistants have been formally assessed as competent to undertake the responsibilities of leading the educational visit or learning outside the classroom activity.

Refer to OEAP National Guidance document:

3.2d **“Approval of Leaders”** <https://oeapng.info/download/1084/>

To be deemed competent, a Visit / Activity Leader, or Assistant 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. The OEAP Education Visit Leader qualification is an indicator of competence. (See section 3).

OEAP National Guidance sets a clear standard to which leaders **must** work to.

Staff participating in educational visits and learning outside the classroom activities 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 both newly qualified and newly appointed staff.

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.

Refer to OEAP National Guidance document:

4.3a **“Good Practice Basics”** <https://oeapng.info/download/1140/>

## **9. Key Roles**

All roles clearly identified on the NG website <https://oeapng.info> Specific roles are identified and clearly defined as EVC, Visit Leader, Assistant Leaders, Volunteers, Head Teacher/Principal, Governing Body and Employer. There is specific guidance and information for each role.

All visits will have a named visit leader and assistant leaders who are aware of their roles and responsibilities contained within the NG website. Volunteers are managed under the school volunteer policy including relevant DBS checks.

#### **NG documents Roles 3.4a-o**

3.4j “EVC” <http://oeapng.info/download/1122/>

3.4k “EVL” 3.4k <http://oeapng.info/download/1124/>

3.4g “Head Teacher” <http://oeapng.info/download/1116/>

3.1 “Assistant Leader” <http://oeapng.info/download/1126/>

3.4o “Volunteer” <http://oeapng.info/download/1792/>

3.4f “Member of a Management Board or Governing Body” <http://oeapng.info/download/1114/>

### **10. Charges for Educational Visits and Off-site Activities**

Refer to OEAP National Guidance document: 3.2c “**Charging for School Activities**”  
<https://oeapng.info/download/1082/>

Refer to BCC Schools Financial Manual and ensure schools include the text “if voluntary contributions are not sufficient an activity may be cancelled” in their Charging and Remissions policy to highlight to school staff, governors and parents that schools need to formally consider whether they should be subsidising uneconomic trips.

### **11. Vetting and DBS Checks**

The Disclosure and Barring Service (DBS) was established under the Protection of Freedoms Act 2012. The primary role of the DBS is to help employers make safer recruitment decisions and prevent unsuitable people from working with vulnerable groups including children and young people.

However, it must be clearly understood that a DBS check (or other vetting procedure) in itself, is no guarantee as to the suitability of an adult to work with any given group of children, young people or vulnerable adults.

Careful consideration should be given to whether a voluntary helper may require a DBS Enhanced Disclosure. In general terms, those helpers with *frequent* or *intensive* contact e.g. working with a group or groups regularly or involved in accompanying a residential should be checked.

It is **essential** that the full contents of the document below be taken into account.

Refer to OEAP National Guidance document: 3.2g “**Vetting and Disclosure and Barring Service (DBS) Checks**” <https://oeapng.info/download/1090/>

### **12. Requirement to Ensure Effective Supervision**

In general terms, the law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is effective when on educational visits and learning outside the classroom activities.

Refer to OEAP National Guidance **document**:

4.3b **“Ratios and Effective Supervision”** <https://oeapng.info/download/1142/>

4.2a **“Group management and Supervision”** <https://oeapng.info/download/1138/>

### **13. Preliminary Visits and Provider Assurances**

All educational visits and learning outside the classroom activities should be thoroughly researched to establish the suitability of the venue and to check that facilities and third-party provision will meet group needs and expectations. 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. Establishment policy should clarify the circumstances where a preliminary visit is a requirement.

It is good practice for Visit Leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available, thus reducing bureaucracy.

Examples of such schemes include:

- The Council for Learning Outside the Classroom Quality Badge
- AALS licensing
- Adventuremark (AAIAC) Adventure Activity Industry Advisory Committee
- Association of Heads of Outdoor Education Centres Gold Badge
- National Governing Body centre approval schemes (applicable where the provision is a single, specialist activity).

Where a provider holds one of the above accreditations, there should be no need to seek further assurances regarding risk assessments of the provider. Schools and Children’s Services establishments should ensure that leaders complete a risk benefit assessment and record any significant findings for any aspects of a visit that they are leading or responsible. This will usually include transport to and from the venue plus any stops or visits on route.

Refer to: OEAP National Guidance documents

4.4h **“Using External Providers”** <https://oeapng.info/download/1158/>

4.4f **“Checklist Assessing a Provider”** <https://oeapng.info/download/1154/>

4.4g **“Selecting External Providers and Facilities”** <http://oeapng.info/download/4431/>

### **14. Adventure Activities Licensing Regulations**

Employers, Heads/Managers, EVCs and Leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated.

The Activity Centre (Young Persons Safety) Act (1995) established the Adventure Activities Licensing Regulations and the Adventure Activities Licensing Authority (AALA). The scheme is now the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

Leaders should be aware that the AALS licence is an assurance of safety. It does not accredit educational or activity quality.

Refer to OEAP National Guidance document:

3.2f “**Adventure Activity Licensing**” <https://oeapng.info/download/1088/>

## **15. Insurance for Educational Visits and Off-Site Activities.**

### **Non-delegable duty of care**

During October 2013 the UK Supreme Court ruled that, in particular circumstances, schools and other public bodies have a non-delegable duty of care. This is an exception to the normal fault-based principles of law. It means that, in these particular circumstances, schools and other organisations are liable to be sued for the negligence of a third party.

For example, a school contracts with a third-party provider to deliver swimming lessons within school time. If, through the negligence of this third party, a child is injured, the child can sue the school and local authority for compensation. The fact that the school was not responsible for the actions of the third-party is irrelevant as; in this case, the school’s duty of care is non-delegable.

It is therefore important to ensure that any contracts entered into with third parties include terms to carry insurance including indemnity in the event of negligence as local authorities and schools will need to pursue independent third parties for an indemnity or contribution should any such claims succeed.

### **Employer’s Liability Insurance**

Employer’s Liability Insurance is a statutory requirement. The Council holds a policy that indemnifies it against its legal liability in respect of all claims for compensation resulting in bodily injury suffered by any Council employee and employees in schools maintained by the Council. As this type of policy is a statutory requirement any other employer should hold a similar policy in respect of its employees. This cover should extend to those persons who are acting in a voluntary capacity as assistant supervisors.

*Schools, which achieve Academy status, will be obliged to make their own insurance arrangements outside of the Council’s portfolio of covers.*

### **Public Liability Insurance**

The Council also holds Public Liability Insurance, indemnifying it against its legal liability in respect of 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. Employees (as agents of the employer) are indemnified under the policy, as are voluntary helpers acting under the direction of the employer’s staff. The indemnity covers activities such as educational visits and off- site activities including school sports, together with approved extracurricular activities organised by all establishments and settings for which the employer is responsible.

### **Employees**

The Council operates an Employees Personal Accident Scheme. Cover under this section is provided for all Council employees and employees in schools maintained by the Council, in the

course of their employment, providing predetermined benefits in the event of an accident. The scheme's benefits are designed to provide compensation for injury where the employer is not deemed negligent. The Personal Accident Scheme provides cover for all full and part-time employees. Details of the scheme may be obtained from the appropriate staffing section within Human Resources.

### **Insurance for Pupils**

The Council only covers accidents to pupils when due to its negligence and these claims are covered within its Public Liability Insurance detailed above. Personal Accident Insurance for pupils is not arranged by the Council but may be arranged by the school direct; however, there is no statutory requirement for governors to arrange this cover. The cost of Personal Accident Insurance arranged by the school may be recharged to parents. Parents should be reminded that the Council does not insure children's belongings.

For journeys/visits overseas, Governing Bodies **must** insist that Foreign Travel Insurance is arranged that cover **all persons on the visit**. This is especially important, due to the high costs of medical care abroad and possible repatriation expenses in the event of an accident or illness.

For all journeys within the United Kingdom Governing Bodies should decide whether or not they require insurance to be arranged, having regard to the nature of the journey and the capabilities of the pupils involved. In all cases, reference should be made to the Council's guidelines governing educational visits, before final decisions are made.

Schools should notify insurers if the activity involves any form of winter-dangerous sports, as the insurers may need to charge an additional premium.

If additional insurance is not taken out, it is recommended that parents are advised of this and a suggested wording for parental consent forms is detailed below:

"The school is insured against its legal liability to pay compensation should it be held responsible for causing an injury to your child whilst in our care.

The school has not taken out any additional insurance in respect of this visit e.g. personal accident, and, should you be concerned about this area of risk, you are advised to make your own personal arrangements".

**It must be remembered that the Council's public liability arrangements apply for all school-organised activities, including visits within the UK and abroad (unless schools choose to purchase insurance from an alternative provider).**

Visit and activity leaders should contact the Council's Insurance Section to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the insurer.

They should also ensure they have obtained current information regarding any special policies that may be available to offer more comprehensive cover.

Schools should notify insurers if the activity involves any form of winter-dangerous sports, as the insurers may need to charge an additional premium.

**Car Insurance please note;** All staff if they are using their private vehicles for school purposes, including transporting pupils, parents or other staff members, should ensure that their private

motor insurance policy extends to provide them (the driver) with business use cover. They should not use their vehicle unless this extension of cover is operative.

The number for the Insurance section is 0121 303 4829

Reference can also be made to the Schools Financial Procedures Manual

Refer to OEAP National Guidance documents:

4.4c **“Insurance”** <https://oeapng.info/download/1150/>

3.2i **“Contracts and Waivers”** <https://oeapng.info/download/3776/>

One of the lessons learnt from the Pandemic is that travel insurance and providers’ terms and conditions should be carefully considered particularly in relation to cancellations and large outlays by both schools and parents.

## 16. Inclusion

Every effort should be made to ensure that educational visits and learning outside the classroom activities are available and accessible to all, irrespective of special educational or medical needs, disability, ethnic origin, gender, sexuality or religion. If a visit needs to cater for children and 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.

Establishments should take all *reasonably practicable* measures to include all children and young people, unless risk assessment determines otherwise. In accordance with the Equality Act 2010 the principles of inclusion should be promoted and addressed for all visits and reflected in the establishment’s policy, thus ensuring an aspiration towards:

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

Refer to OEAP National Guidance document:

3.2e **“Inclusion”** <https://oeapng.info/download/1086/>

## 17. Duke of Edinburgh Award

The Duke of Edinburgh Award (DofE) is available through schools, local youth clubs and voluntary organisations around the City.

All schools wishing to deliver the DofE must be a Directly Licenced Centre with the DofE and responsibility lies with them for in accordance with their licence with the DofE.

Where DofE expedition activities are involved all appropriate external and internal notifications and approvals should be gained. A DofE Expedition is notifiable as an adventurous activity.

The regional Central DofE office can also offer help and advice on award issues. There are separate Council guidelines that can be obtained from Educational Safety Services. Advice can also be sought from Educational Visits and Outdoor Learning Advisers.

You can also refer to the OEAP National Guidance Document:

7b *“Duke of Edinburgh’s Award Expeditions”* <https://oeapng.info/download/1206/>

7k *“Unaccompanied Expeditions”* <https://oeapng.info/download/4056/>

7L *“Camping”* <http://oeapng.info/download/4059/>

## **18. Transport**

Careful thought must be given to planning transport to support educational visits and learning outside the classroom (off-site) activities. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it. All national and local regulatory requirements must be followed.

Careful consideration to transport in the current Coronavirus Pandemic should be given. The DFE Guidance provides guidance for dedicated transport.

The Visit Leader should ensure that coaches and buses are hired from a reputable company.

Refer to OEAP National Guidance documents:

4.5a *“Transport: General Considerations”* <http://oeapng.info/download/1162/>

4.5b *“Transport in Minibuses”* <http://oeapng.info/download/1164/>

4.5c *“Transport in Private Cars”* <https://oeapng.info/download/1168/>

4.5e *“Hiring a Coach”* <http://oeapng.info/download/2869/>

4.5f *“Checklist – Assessing a Coach Hire Provider”* <http://oeapng.info/download/4321/>

## **19. Planning and Consent**

Planning should reflect your establishments’ procedures, employers’ requirements, legal requirements and good practice requirements. It is critical part of the Risk Benefit assessment and management process that this document is referred to:

Refer to OEAP National Guidance documents:

1b *“Foundations”* <http://oeapng.info/download/2826/>

4.3a *“Good Practice Basics”* <https://oeapng.info/download/1140/>

The degree of complexity of a plan or policy (along with its supporting procedures) will need to reflect the nature and complexity of several variables that can impact on any given activity. These variables can be remembered as **‘STAGED’ and include:**

- **S**taffing requirements
  - Trained?
  - Experienced?
  - Competent? Ratios?
  
- **T**ime of Year
  - Curriculum constraints?
  - Examinations?
  - Staffing issues?
  - Religious festivals?
  - Daylight hours?
  - Travel Conditions
  
- **A**ctivity characteristics
  - Simple or Complex?
  - Specialist?
  - Insurance issues?
  - LOTC badging?
  - Licensable?
  
- **G**roup characteristics
  - Age?
  - Prior experience?
  - Ability?
  - Behaviour?
  - Special and medical needs?
  
- **E**nvironmental conditions
  - Same as previously?
  - Impact of weather and Forecast?
  - Water levels?
  - Temperature?
  
- **D**istance from support mechanisms in place at the home base
  - Transport?
  - Residential?
  - Overseas?
  - Remote?

To reduce bureaucracy and encourage activity, establishments need to take account of the legalities regarding a requirement for formal consent. When an activity is part of the establishment's curriculum or normal working practices and no parental contributions are requested, there may not be a need for specific parental consent. However, in the interests of good relations between the establishment and the home, it is good practice to ensure that those in a position of parental authority are fully informed. Consent forms are often used to update parent's/carer's current phone numbers, contact details plus any medical conditions which have developed since the last check.

It is good practice to obtain blanket parental consent for a range of regularly occurring activities or a specific programme.

It is also good practice to develop *activity*-specific policies at establishment level for regular or routine activities. Such policies should be robust and equate to “*operational guidance*” that makes it clear how the activity should be planned and delivered, meeting all necessary recommendations and requirements, as well as assuring educational quality.

The subject of obtaining consent is a matter for individual school / establishment discretion provided they comply with law.

Refer to OEAP National Guidance document:

4.3d “**Parental Consent**” <http://oeapnq.info/download/1264/>

## **20. Residential and Overseas visits**

Residential visits fall into the enhanced category and require detailed advanced planning and preparation. There are specific management issues associated with these types of visit. Residential experiences can provide powerful learning opportunities that fulfil individual’s personal and social development and promote the aims and benefits that underpin this policy. The school/academies aspiration is that all young people should have a residential opportunity as part of their key educative foundation and offer.

Aspects to consider for all residential:

- Suitability for the age of the group and accessible to the range of abilities and individual needs
- Cost effective, financial considerations, terms and conditions and insurance
- Is the accommodation part of the residential package or is the accommodation separate?
- Sole occupancy, shared or public usage
- Self-catering
- Camping or home stay accommodation
- Overseas visits

4.2b “**Residential Visits**” <https://oeapnq.info/download/2662/>

### **Overseas Visits:**

Overseas visits require meticulous enhanced planning. This has been highlighted in the Coronavirus crisis and world pandemic. Careful shared liaison, discussion as well pre and final approval procedures at several levels is required. All aspects have to be as good and robust as the school/academy can make them.

7r “**Overseas Visits Overseas Visits**” <https://oeapnq.info/download/1228/>

7q “**Overseas Expeditions**” <https://oeapnq.info/download/1226/>

Overseas visits can broaden horizons; enrich the knowledge and cultural understanding of young people. All overseas visits should be notified to BCC Education Safety Services (see section 4)

There have been countries that have experienced recent disasters, conflicts, terrorism or civil unrest as well as the recent world pandemic. When planning an overseas visit, it is imperative to check the Foreign, Commonwealth and Development Office (FCDO) travel advice at time of booking, regular intervals and immediately prior to departure.

<https://www.gov.uk/government/organisations/foreign-commonwealth-development-office>

## **A robust emergency procedure and critical incident plan should be in place.**

DFE guidance; *“Educational visits should be subject to risk assessments as normal and reflect any Public Health advice or in-country advice of the international destination. For international visits, you should refer to the Foreign, Commonwealth and Development travel advice and the guidance on international travel before booking and travelling to make sure the school group meet any requirements especially in relation to vaccinations. You are advised to ensure that all bookings have adequate financial protection in place. You should speak to your visit provider, commercial insurance company, or the risk protection arrangement (RPA) to assess the protection available.”*

### **21. Coronavirus**

Due consideration should be given to managing and planning activities as the world comes out of a current health crisis. This School / Academy should follow relevant Government (e.g. DFE), Local Authority and Employer guidance. Standard operating procedures should be reviewed to take into account any precautions that need to be made. This particularly relates to social distancing, group sizes, personal protective equipment, hygiene whether indoor or outdoors, onsite or off site. Venues should be considered that offer minimum interaction with the public and other groups from other establishments.

The same attention should be given to hygiene outdoors as well as indoors and should include:

- Wash and sanitise hands including when going outside
- Wash hands before and after touching shared objects such as activity equipment
- Wash hands before eating, after using the toilet
- Wash hands after getting on and off transport such as a minibus and when returning inside
- Avoid touching objects shared by the public including doors and gates where possible
- Avoid activities that involve touching each other
- Sanitise equipment before usage

Staff should have available antiseptic hand gel, antiseptic wipes, tissues, bags for waste, gloves and facemasks, disposable aprons and eye protection for administering first aid.

4.4k **“Coronavirus”** <https://oeapnq.info/download/4835/>

DFE Schools Coronavirus (COVID 19) Operational Guidance (latest guidance)

### **22. IN THE EVENT OF A CRITICAL INCIDENT:**

#### **KEY CONTACTS:**

**Please contact BCC School and Governor Support**

Email [school.support@birmingham.gov.uk](mailto:school.support@birmingham.gov.uk)

**SGS Mobile Numbers (Office Hours only)**

**07516 031 742**

**07881 617 187**

**07912 793 437**

**BCC Press Office**

**0121 303 3287 Office Hours**

**BCC Emergency Press Office Out of Hours Contact 24hr BCC Control Centre 0121 303 4149**

Reference and further information from the Council can be found in 'BCC Guidance - Critical Incidents Management; Guidance for Schools January 2019'

[https://www.birmingham.gov.uk/download/downloads/id/1405/critical\\_incident\\_management\\_guidance\\_for\\_schools.docx](https://www.birmingham.gov.uk/download/downloads/id/1405/critical_incident_management_guidance_for_schools.docx)

### **23. Education Safety Services**

**BCC Education Safety Services (ESS):** provide Educational Visits support and guidance for all maintained schools and to those schools where BCC is not the employer e.g. Voluntary Aided, Trust Schools and Academies who subscribe to the Educational Visits service.

**Birmingham Education Support Services (BESS) Online.** This provides easy access to key information, guidance and training from Health and Safety and other BCC Services for schools. You can use the website to book training courses, access policies, guidance, toolkits and renew your service SLA/subscriptions or sign up as a new service user. You will also be able send queries and messages to individual services including Educational Visits. Click the link below to take you to the site.

<http://www.birminghameducationsupportservices.co.uk/>

#### **Recovery Resources Section 7 in the OEAP National Guidance**

**OEAP and CLOtC (2021): "Get Outside – Taking learning beyond the classroom in support of the recovery curriculum "** <https://oeapnq.info/download/8663/>

**OEAP (2020): Learning Outside the Classroom – Activity Cards**

<http://oeapnq.info/download/5149/>

**OEAP (2020): Taking Learning Outside the Classroom – Adapting Activities**

<http://oeapnq.info/download/5155/>

**OEAP & CLOtC (2021): Get Outside - Taking Learning Beyond the Classroom in Support of the Recovery Curriculum** <https://oeapnq.info/download/8663/>

#### **Important Contact Numbers and details.**

##### **Education Safety Services**

[schoolsafety@birmingham.gov.uk](mailto:schoolsafety@birmingham.gov.uk)

Safety Services (Ashted Lock)

P.O. Box 15630

Birmingham

B2 2QF

##### **Educational Visits and Outdoor Learning Advisers:**

Tom Lilley: 07980266367 or

Richard Batty: 07432053936