



**Waterloo**  
Primary Academy

# **Management of Supported & Offsite Visits (Including Learning Outside of the Classroom) Policy Handbook**

**Approved & Adopted:** January 2013

**Responsible Personnel:** Dave Woodcock

**Policy Last Reviewed/Approved:** January 2024

**Review Period:** Annual

**Review Date:** January 2025

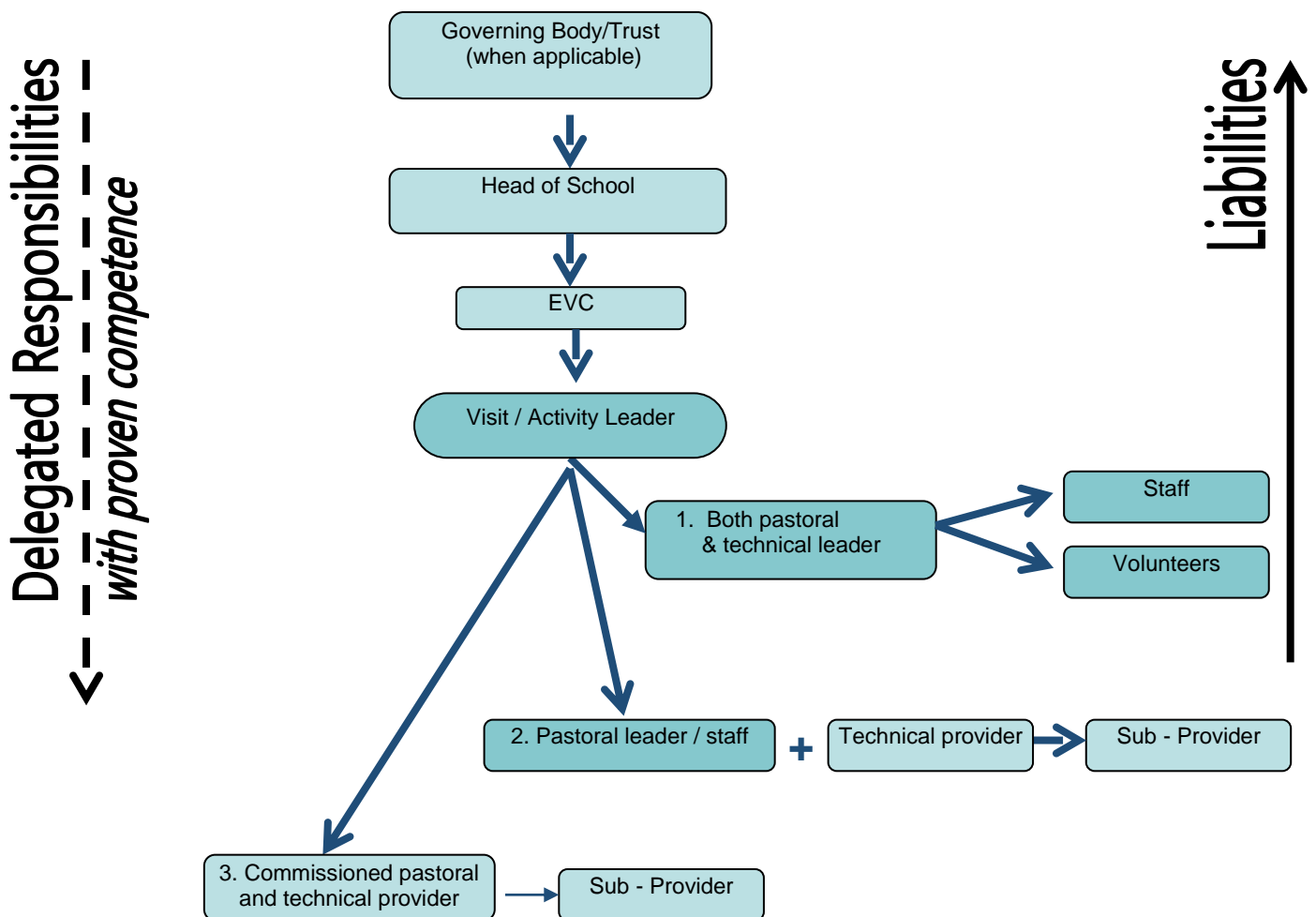
**Provision of Employer Guidance**

Waterloo Academy acknowledges the immense value of supported and offsite visits and related activities and fully supports and encourages those that are well planned and managed.

It is a legal expectation that employees must work within the requirements of their employer’s guidance; therefore, WPA employees who work with children, young people and adults on supported or offsite visits and related activities must follow this policy most of which is a reflection of Outdoor Education Advisers’ Panel (OEAP) National Guidance (NG).

This policy provides managers and staff in school with a clear picture on how to fulfil their health and safety duties. This policy supports and reinforces a common sense and proportionate approach to health and safety and assessment of risk in line with the Government’s drive to discourage wasteful bureaucracy. Nevertheless, documentary evidence is still needed to support the fact that appropriate advance attention is given to the risks of an activity.

The flow chart below illustrates the lines of responsibility and liability.



## Scope and Remit

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This policy and the related guidance applies to employees whose work involves any one of the following:

- direct supervision of children, young people and adults undertaking experiences beyond the boundary of their normal operational base.
- direct supervision of children and young people undertaking experiences that fall within the remit of Learning Outside the Classroom;
- facilitating experiences for children, young people and adults undertaking experiences beyond the boundary of their normal operational base;
- deploying staff who will supervise or facilitate experiences for children, young people and adults undertaking experiences beyond the boundary of their normal operational base;

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

## Ensuring Understanding of Basic Requirements

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As an employer, WPA is required to ensure that its employees are provided with:

- appropriate guidance relating to visits and activities;
- employer-led 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.

It is a requirement of Waterloo Academy that at least one senior member of staff should attend an OEAP accredited EVC Training course and will then act as EVC and support the Head of Service/Establishment. Heads should ensure that the EVC undertakes a formal revalidation approximately every 3 years.

The EVC should be specifically competent, ideally with practical experience in leading and managing a range of visits similar to those typically run by the school.

The EVC should ensure that a policy is in place for supported and offsite visits, and that this is updated as necessary and readily available to staff.

## The current EVC is Dave Woodcock

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## Adventurous Activities

If the school is leading an adventurous activity, the Head of School must ensure that the group leader and other supervisors are suitably competent to lead or instruct the children, young people or adults in the activity. Competences should be demonstrated by holding the relevant National Governing Body (NGB) award where it exists. Where there are queries regarding the competencies/experience required, the relevant NGB should be contacted for advice.

## Other Areas

Staff competence in areas such as first aid, minibus driving and life saving must also be considered when planning activities.

Volunteers will require induction training prior to a specific visit. Training requirements in these areas should be identified as part of the risk assessment process.

Where an employee requires further guidance they should contact the EVC.

## Approval and Notification of Activities and Visits

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Governor/Trust approval is required for visits and activities fulfilling any of the criteria below:

- Visit/activity involves the provision of an adventurous activity to be led by a member of Waterloo Primary Academy staff or an external provider
- Visit/activity involves field work to be led by a member of Waterloo Primary Academy staff in an area of open country
- Visit/activity involves a journey abroad or a significant sea crossing (this includes visits to the Isle of Man, Northern Ireland, the Orkneys and the Shetland Islands)
- Visit/activity involves a stay of one or more nights

A blanket approval is issued at the beginning of the academic year, obtaining parental permission for local and low risk activities throughout the year. **Parents will still be notified of an impending visit by app message or letter.** Generic risk management plans for local visits, transportation, and pastoral care are on the school staff server. These are available for visit leaders to use/adapt to suit the specific needs of their visit. If a generic form does not fit a planned activity, a bespoke risk assessment will be required.

## Risk Management

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As an employer, Waterloo Academy has a legal duty to ensure that risks are managed - requiring them to be reduced to an “acceptable” or “tolerable” level. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring Waterloo Academy 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. Waterloo Academy strongly recommends a “Risk-Benefit Assessment” approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and 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 in place) is “acceptable”. HSE endorse this approach through their Principles of Sensible Risk Management and advocate that it is important that people are exposed to well-managed risks so that they learn how to manage risk for themselves.

**Risk management plans should be submitted to the EVC three weeks before the trip date where possible. For residential activities or high risk activities, one term’s notice should be given.**

There is a legal 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 an individual, or harm several people. These should be recorded on the agreed Waterloo Risk Management template.

**Relevant details of an educational visit should be conveyed by the Visit Leader to those staff attending. The Visit Leader should also make all accompanying staff aware of potential hazards/risks and how these risks are to be managed.**

## Emergency Planning

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Staff involved in a visit must be aware of and adhere to Waterloo Academy's policy on emergency procedures.

A critical (serious and untoward) incident is an incident where any member of a group undertaking a supported or offsite activity has:

- either suffered a life threatening injury or fatality;
- is at serious risk;
- or has gone missing for a significant and unacceptable period.

Certain incidents are also reportable to HSE under RIDDOR (Reporting of Injuries Diseases and Dangerous Occurrences Regulations), see [www.hse.gov.uk/riddor](http://www.hse.gov.uk/riddor).

For further information on reporting accidents see [www.hse.gov.uk/pubns/edis1.pdf](http://www.hse.gov.uk/pubns/edis1.pdf).

As an employer, Waterloo Academy is committed to providing emergency planning procedures to support services/establishments in the event of a serious and untoward incident. Initially, any incident should be handled by following the Academy's policy and procedures but, if it is deemed necessary to activate support from Waterloo Academy, the following telephone numbers should be used:

Jenny Brown            07790903388

Dave Woodcock       07876885554

## Monitoring

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As an employer, Waterloo Academy ensures that there is sample monitoring of the visits and activities undertaken by its establishment. Such monitoring should be in keeping with the recommendations of the relevant Employer Guidance. An EVC or member of the SLT for the academy will monitor a sample of visits.

## Assessment of Leader Competence

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Those organising, leading or supervising visits or activities must be competent to do so. The EVC must assess competence, taking account of staff's ability to lead, manage and control the children, young people and adults partaking in the visit. Competence on specific activities may also be necessary, as well as knowledge of the venue being visited.

Waterloo Academy policy is that 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 service/establishment-led training. It is good practice for employers to provide formal and accredited training to support their guidance e.g. EVC Training, Visit Leader Training and such training may be a requirement prescribed by some employers.
- Knowledge and understanding of academy procedures supported by a structured induction process specified by the service/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 supported or offsite 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 their employer guidance. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff. Waterloo Primary Academy should view the original documents and certificates when verifying leaders' qualifications, and not rely on photocopies.

A volunteer leader cannot be the designated Visit Leader because they are not legally contracted or commissioned. The Health and Safety at Work Act 1974 places overall responsibility for health and safety with the employer and, while volunteers are not employees, they must work to the requirements of the employer within the Waterloo Primary Academy where they volunteer their services.

Employers have legal duties to ensure, so far as is reasonably practicable, the health, safety and welfare of all employees and volunteers.

Volunteer helpers must:

- Be suitably competent and knowledgeable about Waterloo Primary Academy policies/procedures - insofar as they affect the responsibilities they have been assigned;
- Understand the role, responsibilities and limitations assigned and how these integrate with other staff;
- Be prepared to contribute to the evaluation of all aspects of the visit, both during and after the event;

Where a Volunteer Helper is a parent, close relative or partner of a participant on 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 assessment process.

OEAP accredited Visit Leader Training is strongly recommended for all Waterloo Academy employees who lead activities. Currently there is no revalidation requirement however leaders must be current in their knowledge of expectations of good practice, so update refresher training is also strongly recommended. Internal training will be provided by Waterloo Primary Academy.

## Charges for Activities and Visits

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Waterloo Academy Heads/Managers, Curriculum Planners, EVCs and Visit/Activity Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996 or the LA Adult Services local service guidance.

## Vetting and DBS Checks

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Waterloo Academy employees who work frequently or intensively with, or have regular access to young people or vulnerable adults, must undergo a DBS check as part of their recruitment process.

For the purposes of this policy:

- frequently is defined as "once a week or more";
- intensively is defined as 3 times in a 30 day period or overnight (2am - 6am).

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 young or vulnerable people.

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

Recommendation for trainee teachers on placement is that they only accept DBSs obtained through the university or college for where the organisation has signed up to say that they will share our criteria to operate to certain minimum standards. (The practice of using a DBS obtained through another organisation is known as portability. Currently the DBS do not endorse this practice.)

## Requirement to Ensure Effective Supervision

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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'. A **minimum requirement** therefore for Waterloo Primary Academy **low risk offsite visits** is as follows:

**YN 1:4**

**YR 1:6**

**Y1/2 1:8**

**Y3/4/5 1:10**

**Y6 1:12**

**Activities which require coach or bus travel may be deemed appropriate with a higher child to adult ratio, if upon arrival at the destination further adults are available e.g.: swimming teachers.**

**If, after a risk assessment, the activity is deemed medium or high risk, the ratios should be adjusted accordingly and sent to the EVC for approval.**

Visit Leaders must ensure there is an appropriate level of supervision at all times for all visits and that such supervision is effective. This must have been approved by the EVC and Head of School and, where applicable, in accordance with Governing Body policy.

Effective supervision should be determined by proper consideration of:

- age (including the developmental age) of the group;
- gender 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 competence.

However, as an exception to the above, Ofsted and DfE guidance prescribe ratios for Early Years.

**Staff assigned to support the special needs of particular individuals cannot be included in the overall staffing ratio.** Their responsibility should not include the wider group.

Particular consideration should be given to the additional implications that may arise if staff are to be accompanied by family members (or partners) on visits.

## Preliminary Visits and Provider Assurances

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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. Such information gathering is essential in assessing

the requirements for effective supervision of children, young people and adults. It is a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. Waterloo Primary Academy 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 LOtC Quality Badge
- AALS licensing
- Adventuremark
- NGB centre approval schemes (applicable where the provision is a single, specialist activity).

Waterloo Academy takes the view that where a provider holds one of the above accreditations, there should be no need to seek further assurances.

**If the provider does not hold a recognised accreditation, Waterloo Primary Academy must carry out a preliminary visit to check suitability and provision.**

### Insurances for Activities and Visits

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Employer's Liability Insurance is a statutory requirement and Waterloo Academy holds a policy that indemnifies it against all claims for compensation for bodily injury suffered by any person employed by it if it is proved that the Academy has been negligent in its duties. This cover extends to those persons who are acting in a voluntary capacity as assistant leaders. Waterloo Primary Academy also holds Public Liability insurance, indemnifying it against all 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 on the part of the Academy is proved. Employees (as agents of the employer) are indemnified against all such claims, as are voluntary helpers acting under the direction of the employer's staff. The indemnity covers activities and visits organised by all services/establishments for which the employer is responsible.

Some level of Personal Accident Insurance is provided for all Waterloo Primary Academy employees in the course of their employment, providing predetermined benefits in the event of an accident

The policies above consider claims where Waterloo Primary Academy is considered by the claimant to be at fault and the claimant wants compensation. Group Leaders should therefore give consideration to the following 3 types of insurance cover and satisfy themselves that adequate cover is in place:

- **Travel insurance** - This covers risk such as cancellation, medical expenses, loss of money, loss of personal effects, business equipment, personal accident etc. When travelling abroad, Visit Leaders must carry an Injury & Travel Assistance Card supplied by the insurer. Visit Leaders should ensure that any hazardous activities are covered by the Insurance Policy used.
- **Motor Vehicle Insurance** - As a minimum third party cover must be in place. Visit/Activity leaders should contact their own insurance company to confirm that their level of cover is appropriate and that they are covered for business use.
- **Liability Cover** - When using an external provider, the Visit/Activity Leader must ensure that the provider has Public Liability Insurance in place with a minimum limit of £5 million.



## Inclusion and the Equality Act 2010

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Every effort should be made to ensure that outdoor learning activities and 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 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.

Services/Establishments should take all reasonably practicable measures to include all children, young people and adults. The principles of inclusion should be promoted and addressed for all visits and reflected in Waterloo Primary Academy policy, thus ensuring an aspiration towards:

- an entitlement to participate
- accessibility through direct or realistic adaptation or modification
- integration through participation with peers

Employers, Heads/Managers, Curriculum Planners, EVCs and Visit Leaders should be aware of the extent to which Inclusion is or is not a legal issue.

Under the Equality Act 2010, it would be discriminatory to:

- treat a disabled person less favourably;
- fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage without justification.

Staff must be aware of appropriate language and behaviour towards children, young people and adults from diverse backgrounds.

## Adventure Activities Licensing Regulations

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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), initially responsible to the DfES. The scheme is now the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

The intention of the regulations is to provide a regulatory framework to protect children, parents, teachers and schools when using providers of defined adventurous activities in closely defined environments. The regulations and supporting inspection regime provide a formal process of professional inspection to accredit that providers have effective safety management systems and processes, meeting a national standard.

The definitive source of advice on the Licensing Regulations is to be found in the Health and Safety Executive publication: "Guidance to the Licensing Authority on Adventure Activity Licensing Regulations 1996".

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

## Transport

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Careful thought must be given to planning transport to support activities and visits. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it and services/establishments must follow the specialist guidance. All national and local regulatory requirements must be followed.

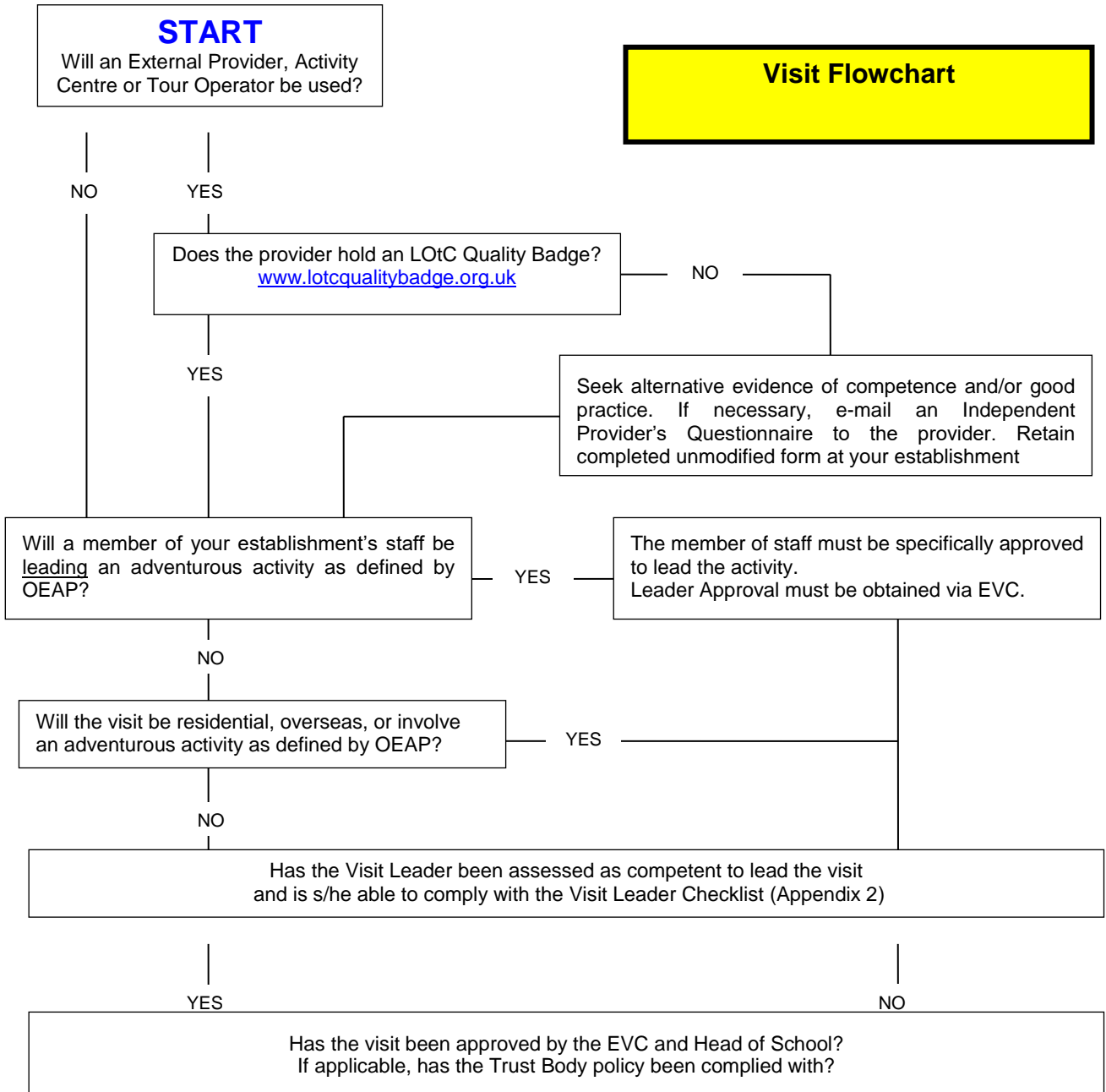
The level of supervision necessary should be considered as part of the risk management process when planning the journey, giving proper consideration to issues of driver-distraction when considering what supervision is required for the specific group of passengers being transported in a minibus.

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

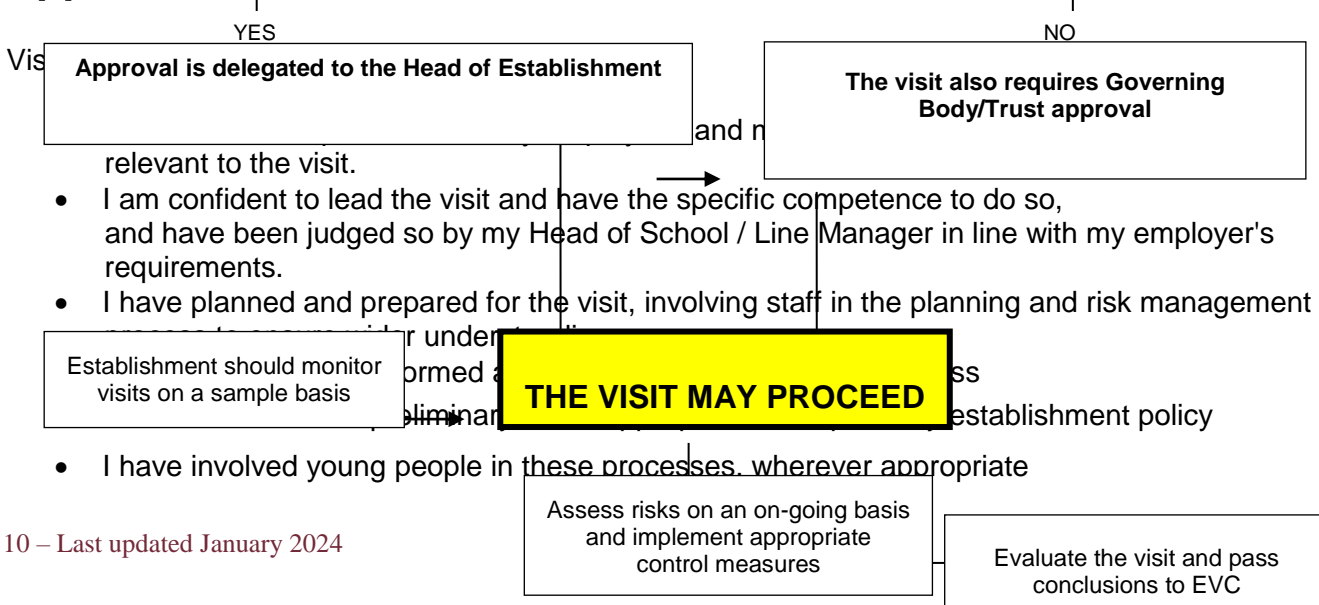
Transporting people in private cars requires careful consideration. Where this occurs, there should be recorded procedures (included in the risk management plan). If children are to be passengers in a private staff car, appropriate **business use insurance must be in place. No member of staff should be alone in a car with children.**

Generic risk assessments can be found on the server for various forms of transport. If these do not sufficiently cover all possible risks for an individual visit, they should be amended accordingly.

## Visit Flowchart



## Appendix 2





- I have defined the roles and responsibilities of other staff (and young people) to ensure effective supervision, and have appointed a deputy
- I have shared details of 24/7 emergency contacts and emergency arrangements with key staff
- I have obtained parental consent forms (where required), medical details and contact details and these have been copied and shared with relevant staff and providers
- I have checked whether insurance arrangements are adequate
- If accompanying leaders take a family member on a visit, there are adequate safeguards to ensure that this will not compromise group management
- Child protection issues are addressed, including CRB/ ISA checks and processes where appropriate
- I have disseminated relevant information to supporting staff
- There is access to first aid at an appropriate level
- Relevant information has been provided to parents and young people and pre-visit information meetings have been arranged where appropriate
- All aspects of the visit (both during and after the event) are evaluated
- Staff and other supervisors have been appropriately briefed on:
  - The nature of the group, including age, health characteristics, capabilities, special educational needs, likely behaviour and any other information relevant to the planned activities
  - The nature and location of the activity
  - The visit is effectively supervised - staffing ratios meet requirements of good practice
- I understand that the overarching duty of care remains with establishment leaders, even when partial responsibility is shared with a provider
- Staff and third party providers have access to emergency contact and emergency procedure details