

Ormiston Academies Trust

Ormiston SWB Academy

Management of off-site visits and related activities policy

Policy version control

Policy type	Mandatory
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Approved by	National Leadership Group
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Review	Policies will be reviewed in line with OAT's internal policy schedule and/or updated when new legislation comes into force
Description of changes	• Updated version with contact changes • Training – Mandatory for all Visit Leaders to complete Leader Training course arranged by Evolve Advice • Finance – All Finance Regional Partners to approve all visits over £5,000 on Evolve, 3 quotes must be uploaded to the Evolve form • Risk Management – Procedures have been added to OATNet to provide support and guidance with the management of risk when arranging visits

Policy Digest

All off-site visits should have a meaningful educational value for the children involved.

All visits must be recorded on the EVOLVE Visits system and staffing and resources arranged and approved by the Academy Principal– please use the [OAT Trips Checklist Template 2024.docx](#) or similar (own academy) form.

All off-site visits must be planned, resourced, and risk assessed well in advance. All documentation is to be completed directly on or uploaded to the EVOLVE Visits system. When a visit is over £5000, prior approval must be sought from the Regional Finance Partner and approved within the EVOLVE system.

All off-site educational and non-educational visits must be added to the Evolve system prior to the visit taking place as follows:

- Category A visits are local (single day) off-site visits and sports fixtures. These are authorised by the academy EVC through the local visit form on EVOLVE visits.
- Category B visits are single day off-site visits with additional risks to consider such as being further away and requiring additional transport). These are checked by the EVC and authorised by the principal on the main visits form in EVOLVE visits.
- *Category C visits are single or multi-day visits with higher risks than usual. This includes international, UK residential as well as adventurous activities are to be added to the main visit form within Evolve and approved by the Principal and Evolve Advice
- *Please note that CAT C must be added 20 days before the trip occurs to allow sufficient time for Evolve Advice to review.
- All pupils must be added to Evolve within the visit manager and registered during the visit.
- The Event Specific Plan must be completed highlighting risk mitigation and any pupil who has SEND, disability or medical requirements must have an individual risk assessment.
- Training is mandatory for EVC's and Trip Leaders and this is detailed within section 10.

For further information and guidance please visit [Offsite Visits - Evolve](#)

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1. Introduction

- 1.1. Educational visits are educational activities that take place away from the usual school site and are often referred to simply as 'visits' or 'trip'.
- 1.2. Educational visits provide children with a huge range of positive experiences, that can often have a profound effect on their development. They should not be seen as an isolated opportunity, but as an essential element within a broad and balanced education, completed both within and extra to the curriculum.
- 1.3. There is substantial evidence that outdoor learning and offsite educational visits can be effective at achieving a wide range of outcomes for children, including:
 - developing social and personal skills
 - learning to be healthy and stay safe
 - enjoying new activities and experiencing success
 - contributing to society
 - protecting the environment
 - achieving economic wellbeing
- 1.4. The range of activities covered by this policy includes:
 - 1.4.1. **Category visit A** | These visits are within the local area and are usually of lower risk. Examples include walking to the local park/school, sporting fixtures and may involve a short journey (30 minutes) in a minibus.
 - 1.4.2. **Category visit B** | These visits are to areas beyond the local area (such as shopping centres, museums, theatre, cinema) and involve more complex environments and activities. This is to be approved and signed by the EVC and the principal. There may be some specialist training attached to some activities in this area. Examples include visits further afield and where public transport is used.
 - 1.4.3. **Category visit C** | These visits include residential visits and overseas visits, adventure activities (such as Duke of Edinburgh's award (DofE) and activities involving water. These will be checked by OATs advisers Evolve Advice. If you are unsure whether your visit is category C, please refer to OATnet site [Off site visits - Evolve](#)

2. The legal framework - Employees

- 2.1. The health and safety at work requirements must be taken into consideration whenever an activity is being planned. Many activities will fall within the "normal" school day and will therefore be included in "directed" time. However, where an activity falls partly or solely outside the school day, there are implications for employment. [HSE Educational Trips](#)
- 2.2. Staff cannot be required to undertake activities out of their normal working time. It is therefore crucial to ensure that staff have volunteered their services for out of school hours activities and that full indemnity

is available for all those taking part in such activities. Under the Health and Safety at Work, etc., Act 1974: employers are responsible for the health, safety, and welfare at work of their employees. [HSE](#)

- 2.3. Employers are also under a duty of care to ensure, so far as is reasonably practicable, the health and safety of anyone else on the premises or anyone who may be affected by their activities. This duty of care extends to the students in school and includes participants in off-site visits.
- 2.4. The Management of Health and Safety at Work Regulations 1992 requires the employer to assess the risks of activities, to introduce measures to control those risks and to tell employees about the measures taken.
- 2.5. Responsibility also falls to the employee to take reasonable care of their own and others' health and safety: to co-operate with their employer over safety matters: to carry out activities in accordance with the instructions and training they have received and to inform the employer of any serious risks they encounter.
- 2.6. Teachers also have a common law duty to act "in loco parentis" (as a reasonable parent), as indeed would any other employee involved in an off-site activity.
- 2.7. All staff or volunteers carrying out educational visits and activities must comply with OAT policies in particular those relating to Safeguarding and Child Protection, Allegations of Abuse Against Staff and Low-Level Concerns, OAT Staff Code of Conduct.
- 2.8. All educational visits and activities booking and purchasing must comply with the OAT Procurement Policy, OAT Expenses policy and use of procurement card for purchasing goods and services. [Procurement](#)

3. Scope and remit

- 3.1. This policy applies to Ormiston Academies Trust employees and volunteers whose work involves any of the following, regardless of whether the activities take place within or outside of normal working hours, including weekend and holiday periods.
 - 3.1.1. Direct supervision of children undertaking experiences beyond the boundary of their normal operational base.
 - 3.1.2. Facilitating experiences for children undertaking experiences beyond the boundary of their normal operational base.
 - 3.1.3. Deploying staff who will supervise or facilitate experiences of, or for, children undertaking experiences beyond the boundary of their normal operational base.
- 3.2. All OAT academies are required to adhere to the policy for the management of all off-site visits and related activities.
- 3.3. The Evolve system (EVOLVE – Ormiston Academies Trust) (procured centrally) is to be used by all academies for managing all off-site educational visits.

- 3.4. All academies should refer to procedures and guidance within OATnet site [Off site visits - Evolve](#)

4. Advice and support

- 4.1. As the employer, Ormiston Academies Trust will provide:
- 4.1.1. Appropriate and approved guidance. The resources section in Evolve and the OATnet site Off site visits - Evolve has lots of useful information and guidance about off-site visits and activities. Employees must be familiar with this policy, forms, and checklists and how to access approved National Guidance (published by the Association of Advisers for Outdoor Learning and Educational Visits, formerly known as the OEAP).
- 4.1.2. Access to training upon request to ensure that those trained are kept up to date. Training requirements have been detailed below within section 10.
- 4.2. For the purposes of day-to-day updating of information, EVCs and visit leaders and other staff supporting visits are directed to the posting of EVC Update, an occasional newsletter, in the EVOLVE Resources area.
- 4.3. Access to advice and expertise from appointed staff who have experience in managing offsite visits and the management and mitigation of risk.
- 4.4. Where an employee experiences problems finding specific material, or requires clarification or further help and guidance, they must contact their establishment's Educational Visits Coordinator (EVC), in the first instance.

5. Role-specific requirements

- 5.1. Each establishment is required to have the following in place:
- 5.1.1. An Educational Visits Co-ordinator (EVC) to oversee and co-ordinate all visits. They are trained (in line with OEAP national guidance as detailed within Evolve) and have sufficient understanding to oversee and manage all visits (note that in some cases an academy can also appoint an administrator to support the EVC if required) ensuring these are signed off as appropriate.
- 5.1.2. A designated visit leader for each visit who is trained (in line with OEAP national guidance as detailed within Evolve) and competent dependant on the activity or visit type. The visit leader is in charge or ensuring all arrangements are made for a safe effective trip and remains responsible throughout the trip.
- 5.2. The Principal retains overall responsibility for all visits, and must ensure that all visits follow this policy. Category B and Category C visits require Principal to check the planned arrangements on EVOLVE prior to approval being issued. The Principal can delegate this duty to a member of SLT, however this delegation must be approved in writing by the Trust prior to any visits taking place. All offsite visits must be added to the Evolve system in line with procedures within OATnet site [Off site visits - Evolve](#)

6. Notification and approval of off-site visits and related activities

- 6.1. The OAT procedure for the notification and approval of off-site visits and related activities. [Off site visits - Evolve](#)
- 6.2. All visits and related activities must be recorded and signed off within the Evolve system as follows:
 - 6.2.1 **Category A visits** the leader must have the visit plan checked by the EVC (and challenged if required), prior to authorisation by the EVC prior to the visit.
 - 6.2.2 **Category B visits** the leader must have the visit plan checked (and challenged if required), prior to authorisation by the EVC and the principal prior to the visit.
 - 6.2.3 **Category C visits** the leader must have the visit plan checked (and challenged if required) prior to authorisation by the EVC and the principal prior to the visit. If the cost of the visit is £5,000+ this must be signed off and agreed by the finance business partner. (recorded in the Evolve System)
- 6.3. OAT health and safety central team and Evolve Advice will require at least **20 working days'** notice to review and process documented information. If submitted less than 20 working days' notice the visit may not be able to go ahead.
- 6.4. For overseas visits and those involving complex arrangements, staff must be prepared to discuss such visits with OAT health and safety central team well in advance, possibly 12 months before the departure date.

7. Finance

- 7.1. Please be aware that all educational visits carried out during normal school hours cannot be charged to parents, however a voluntary donation can be asked for.
- 7.2. Where a visit requires food and lodgings or activities outside of core hours (i.e. weekends) you can ask parents to pay. Please see more information regarding this on the Government website. [Charging for school activities](#)
- 7.3. Academy finance leads **MUST** be involved in assisting with completing the costings for each visit.
- 7.4. All visits that are likely to cost more than £5,000 must be agreed with the regional finance business partner in advance of setting up the trip and approved on Evolve. Three quotes or business case must be uploaded to Evolve and approved by your Regional Finance Partner.
- 7.5. Academy Finance Team must follow the OAT Procurement Policy and ensure that required businesses cases are completed and approved in advance of the visit where required. The business case should be approved first before any prior financial (or moral) commitment is made to travel companies, this includes reservation deposits etc, no monies should be taken or commitment made to parents before the business case is approved. [Procurement](#)

- 7.6. If a contingency is to be incorporated into the visit cost, then this must be limited to 5%.
- 7.7. Where parents have donated to the cost of a visit, if this results in any surplus (£10 per student) this needs to be refunded back to the parents.
- 7.8. Procurement cards can only be taken on a visit if they are in the name of the trip leader. Requests for new procurement cards to be issued to new trip leaders need to be made to OAT finance within 1 month of the visit departing.
- 7.9. The use of cash on a visit should try and be avoided where possible. All procurement cards have the ability to withdraw cash position switched off as a default position. If cash may be required on a visit, then OAT finance needs to be informed by the card holder to switch on the ability to withdraw cash within one week of the visit departing.

8. Monitoring

- 8.1. Academy principals are responsible for monitoring the implementation of this policy and associated guidance within their establishment.
- 8.2. Monitoring should be carried out through systems put in place by the Academy Principal and EVC in accordance with OEAP National Guidance: Section 3.2b Monitoring. This will include monitoring, on a sample basis, visits in progress (sometimes referred to as field monitoring).
- 8.3. OAT Health and Safety central Team and Evolve Advice will monitor selected visits and activities (across all categories) from time to time to ensure Health and safety compliance.
- 8.4. OAT Central Team 'Head of Compliance and Reporting' with support from Regional Finance Team will monitor selected visits and activities from time to time to ensure Finance compliance.
- 8.5. OAT Central Team 'School Improvement Team' will from time to time collate type and frequency of educational visits to inform discussion about equity and variety of visits and experiences for children.
- 8.6. OAT Central Team will review this policy and process annually.

9. Risk management

- 9.1. Risks are expected to be reduced to an acceptable level, but not necessarily eliminated. Planning should achieve a rational balance between potential adverse risks and the intended benefits and outcomes of the activity. The management of the risks are to be detailed within the EVOLVE Visits system.
- 9.2. Risk management tasks are delegated to academies and should be carried out by the Visit Leader (and Leaders) with the support of EVCs and other colleagues as required.

- 9.3. A 'detailed visits plan' (which incorporates a risk assessment) must be recorded within the Evolve system – this will provide detail on how all risks will be managed. This is known as 'Event Specific Plan' on Evolve.
- 9.4. For children who have specific additional needs (including but not limited to medical, SEND or safeguarding needs) consider whether an individual Risk Assessment should be completed and uploaded to the visit pack on EVOLVE visits. A template risk assessment is available on OATnet that can be adopted and uploaded.
- 9.5. To minimise the risk associated with administering 'over the counter' medication during the visit please ensure consent and up-to-date medical information (including details of all allergies and regular medication) is collected for each child prior to the visit and included within the individual RA as above.
- 9.6. Ensure that parents are notified about what home remedies will be carried by visit leaders and what the process for issuing these will be, in line with the 'Supporting Children with Medical Needs' policy.
- 9.7. Where individual medication may be required during an off-site visit (e.g., prescribed medication) consider whether it should be carried by the child or a member of staff, and ensure parents are in agreement with this.
- 9.8. Visit Leaders must provide a pack of information for all staff supporting the visit and for the duty member of academy SLT whilst the visit is taking place. This should include the visit plan and risk assessment(s), details of those on the visit, and what to do in the event of an incident or emergency.
- 9.9. All EVC and leader training arranged through Evolve Advice covers general visit risk management.

10. Training

- 10.1. OAT recognises, requires, and mandates as appropriate, the following basic training courses for visit stakeholders:
 - 10.1.1. Educational Visits Co-ordinator (EVC) Training...
 - All academy staff with EVC accounts on EVOLVE Visits must have completed an OAT EVC Training course delivered by Evolve Advice to include general risk management training. This is paid for and arranged by the central OAT team.
 - 10.1.2. EVCs must complete initial training arranged by EVOLVE Advice, in conjunction with the OAT health and safety central team. Following initial EVC training, EVC's must refresh their training at least every three years. This can be through regular but shorter training sessions, or on a full re-training session completed on a three-yearly cycle. Completion of this training is to be recorded within the EVOLVE Visits system and monitored by OAT Central Team.
 - 10.1.3. Leader Training...

- All Leaders carrying out visits must have completed the OAT Visit Leader training course delivered by EVOLVE Advice, with evidence of completion uploaded to EVOLVE Visits system. This is paid for and arranged by the central OAT team. This will be monitored by OAT central team.
 - All leaders are required to be appropriately competent to fulfil their responsibilities. This will require them to be current in their knowledge of good practice and be able to apply it when planning and leading visits.
 - It is recommended that all staff who support on educational visits off site complete the OAT leader training course delivered by Evolve Advice. This is paid for and arranged by the central OAT team.
- 10.2. The following training courses may also be required for those staff leading the following visit types, please see links to arrange these courses within the training matrix:
- 10.2.1. **Educational visits in remote or hostile terrain:** Off-Site Safety Management, OSSM (Royal Geographical Society, RGS) - training for expedition leaders
- 10.2.2. **Snow sports educational visits:** Snowsports Course Organiser award, SCO (Snowsport England) training for staff organising and/or leading
- 10.2.3. **Duke of Edinburgh's Award:** leaders should follow the requirements stated in the OAT DofE Expedition guidance document (available from the OAT Enrichment Team)
- 10.2.4. **Walking visits:** the following courses (where not DofE) may be required for those staff leading the following...
- **Lowland walking** – (Lowland Expedition Leader Award [Leadership Skills Foundation] or Lowland Leader Award with Camping Leader Award [Mountain Training UK]),
 - **Hill and moorland walking** – (Hill and Moorland Leader Award with Camping - Mountain training UK
 - **Mountain walking** – (Mountain Leader Award [Mountain Training UK])
- 10.3. Identification of training needs and provision of appropriate training courses is delegated to Academies with support from OAT Central Team. The cost of this training is paid for by the academy.
- 10.4. EVOLVE Advice will check that leaders have completed the above training for Category C visits prior to signing off the visit. If a leader has not completed the appropriate training the trip cannot go ahead unless alternative and suitable arrangements are made.
- 10.5. Training must be kept current, and certificates are to be uploaded to the individual's profile on EVOLVE Visits. Where this individual is a volunteer without access to the system, the EVC is required to do this on their behalf.
- 10.6. Training must be kept current, and certificates are to be uploaded to the individual's profile on EVOLVE Visits. Where this individual is a volunteer without access to the system, the EVC is required to do this on their behalf.
- 10.7. To find training courses and how to arrange the training for off-site visit stakeholders can be found on OATnet. [Off site visits - Evolve](#)

11. Insurance

- 11.1. All academies purchase insurance through the OAT Service Agreement and are automatically insured for the following:
- Personal Accident and Travel insurance.
 - Employer's and public liability policies are in place in the event of personal injury claim being brought against the establishment.
- 11.2. Academies should be aware of the limitations and exclusions. In broad terms the cover will provide indemnity for all trips (including snow sports) apart from the following:
- Motor cycling
 - Racing of any kind other than on foot
 - Jet skiing or white-water rafting
 - Mountaineering or rock-climbing using rope or guides
 - Hiking, trekking or mountaineering above 3,000 meters
 - Caving using caving equipment
 - Diving using external breathing apparatus
- 11.3. It is expected that activity providers will have specialist insurance to cover above activities. If you are planning on these activities, you must confirm cover is in place by the activity provider and record the insurance details in Evolve.
- 11.4. Any related additional insurance costs must be agreed with your Academy Regional Finance Partner.

12. Management of incidents, emergencies, and critical incidents

- 12.1. In the event of an emergency or incident trip leaders must contact their home visit contact and if required PLMR who will provide any additional support – for more information please follow guidance on OATnet. [Major incident and crisis](#)
- 12.2. A duty member of academy SLT (or appointed person) should be nominated as the 'home contact' for off-site visits and must have 24-hour contact capability during the visit in the case of an incident or emergency. It is their responsibility to support the Visit Leader, to communicate with parents/carers (as appropriate) and with other members of the academy SLT.
- 12.3. As soon as is practical, Visit Leaders must report accidents, incidents or near misses on off-site visits via the iAM Compliant system under 'report an incident'. They must also notify the parent/carer and home contact as soon as possible and as required.
- 12.4. As soon as is practical, Visit Leaders must report any safeguarding concerns via CPOMS. In the event the member of staff on the off-site visit (e.g., a volunteer) does not have access to the system, the

safeguarding concern should be recorded by the Visit Leader, EVC or member of academy SLT on their behalf.