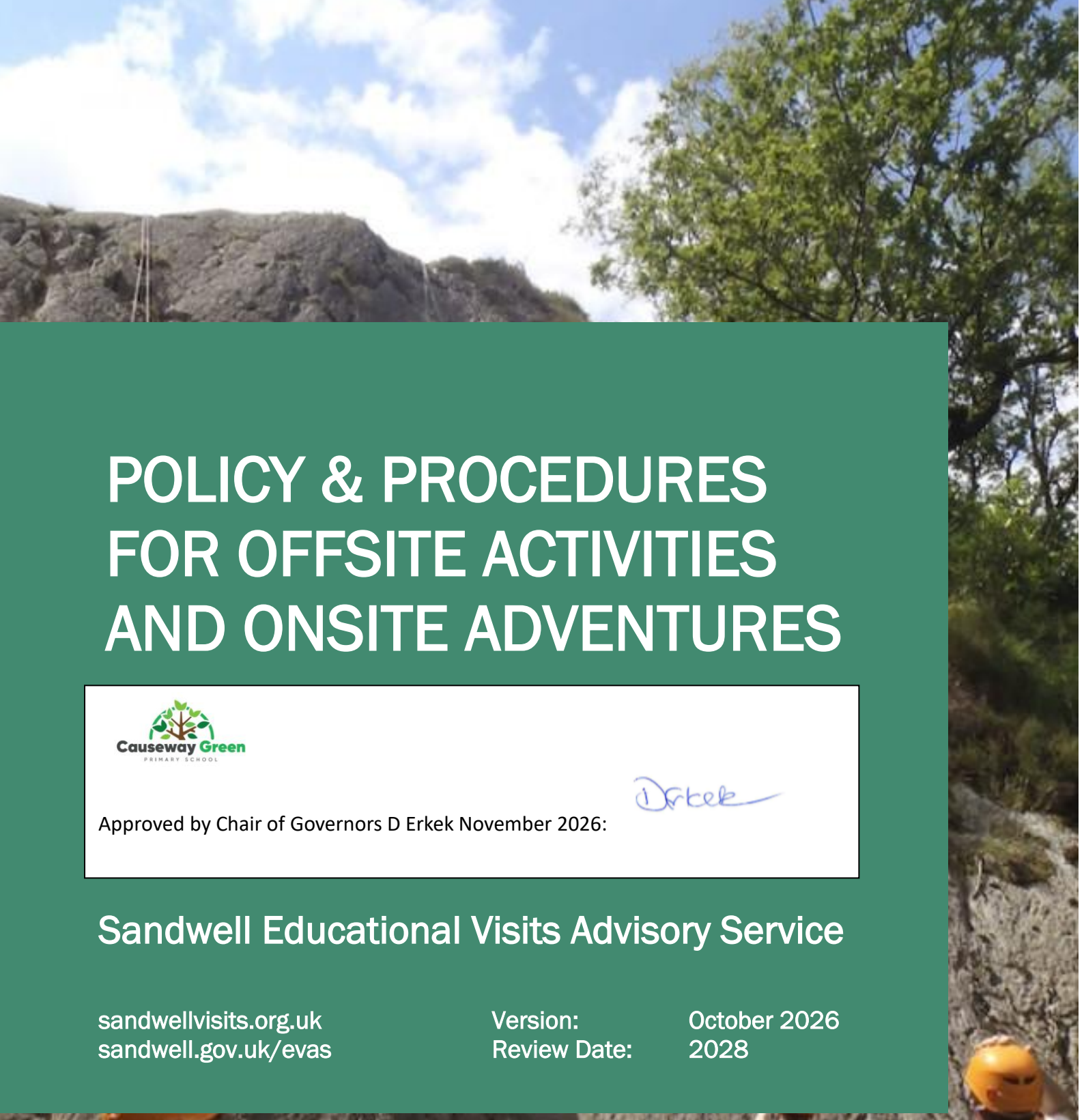


POLICY & PROCEDURES FOR OFFSITE ACTIVITIES AND ONSITE ADVENTURES

Causeway Green
PRIMARY SCHOOL

Approved by Chair of Governors D Erkek November 2026:

Sandwell Educational Visits Advisory Service

sandwellvisits.org.uk
sandwell.gov.uk/evas

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1. Provision of Employer Guidance

Sandwell Metropolitan Borough Council (SMBC) has formally adopted the Outdoor Education Advisers Panel (OEAP) Guidance for the Management of Outdoor Learning, Offsite Visits and Learning Outside the Classroom (LOtC) "National Guidance" as "Sandwell Metropolitan Borough Council Policy & Procedures for Offsite Activities and Onsite Adventures". The OEAP National Guidance can be found at **http://oeapng.info**

It is a legal requirement that employees **must** work within the requirements of their employer's guidance: therefore, SMBC employees must then follow the requirements of "OEAP National Guidance (NG)", as well as the requirements of this policy statement.

SMBC employees should also follow OEAP NG recommendations.

Where another employer (such as the Governing Body of a Voluntary Aided school) wishes to opt into the SMBC policy, systems and processes for supporting and monitoring LOtC activities, they should produce a policy statement that makes this clear and sign a Service Level Agreement (SLA) with the Educational Visits Team.

Where an SMBC employee commissions LOtC activity, they must ensure that such commissioned agent has either:

a. adopted SMBC or OEAP NG, **or**
b. have systems and procedures in place where the standards are not less than those required by OEAP NG.

2. Activities Not Covered by this Policy

The following activities are not covered by this policy:

1. **Onsite Activities** except for the following activities which do fall under the scope of this policy:
    a. any form of **overnight activity / residential** taking place on your own site; this includes camping in your school/establishment grounds, sleeping in the school hall, classrooms, etc.
    b. **adventurous activities** – any activity in the list of adventurous activities that is taking place on your own site.
2. **Transition Days** taking place at other schools or colleges, as well as university open days. These should be classed as alternative provision and be risk assessed and managed under your transitions policy.
3. **Travel between split sites**. Where a school/establishment is split across two or more sites (within Sandwell), travelling between these sites as part of the normal curriculum should be managed outside of this policy. For example, Campus A is on Union Street and Campus B is on Abbey Street - travelling between Campus A and B does not fall within this policy.
4. **Work Experience**, unless it is residential, abroad or involves an adventurous activity.
5. **Bikeability Level 1,** or other onsite cycle training.

Note: **Bikeability Level 2** is covered. Please refer to specific guidance in the Requirements for Effective Supervision.



3. Ensuring Understanding of Basic Requirements

As an employer, SMBC is required to make sure that its employees are provided with:

- clear guidance relating to visits and LOtC activity,
- employer-recognised training courses to support the policy to make sure that it is understood,
- suitable systems and processes to make sure 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 policy, the training and expectations set by current good practice.

The appropriate guidance for the management of outdoor learning and LOtC in SMBC is the OEAP NG website.

4. Training Requirements

All SMBC Children's Services settings must have trained Educational Visits Coordinators (EVCs) and Visit Leaders (VLs).

- Training must be OEAP accredited.
- EVC training must be renewed every 3 years.
- VL training should be delivered face-to-face and include both theory and practical elements.

Training Provided by SMBC

1. **EVC Training (OEAP Accredited)**
   - to book, you must already be an experienced VL.
   - You should hold a sufficient role in your school/establishment, able to guide practice, assess competence, and advise senior staff and governors.
2. **EVC Revalidation Training (OEAP Accredited)**
   - Required every 3 years.
3. **Visit Leader (VL) Training (OEAP Accredited)**
   - Mandatory for anyone leading offsite activities/visits
   - Recommended for Deputy Leaders (DL) if the visit includes an overnight stay.
   - For overseas visits, both VL and DL must be trained.
4. **Visit Leader Refresher Training (SMBC):**
   - Leaders must keep their knowledge of good practice up to date.
   - Refresher is recommended every 3 years for those who have already completed VL Training.

Regular updates and booking details are available in the "Latest News" section at **www.sandwellvisits.org.uk.**

Other Training: Food Hygiene for Self-Catered Visits
By law, anyone handling food must understand food hygiene and safe working practices.



- For self-catered visits, at least one staff member accompanying a visit must complete a **Level 2 Food Hygiene and Safety** course.
- This person should take responsibility for menu planning and overseeing the handling and cooking of food.
- Training is available online from a variety of providers.

Support and Guidance
If staff have difficulty accessing training, wish to check the validity of external courses, or need further clarification they should contact **their establishment's EVC**, or the Adviser nominated by their employer. The nominated Advisers in SMBC are:

Aileen Barlow	**Christina Grange**
07920 757 479	07767 311 497
aileen_barlow@sandwell.gov.uk	christina_grange@sandwell.gov.uk

You can find other OEAP Advisers here.

5. Approval & Notification of Activities and Visits

SMBC uses EVOLVE, an online system for planning, approving, evaluating visits. The system automatically alerts the Local Authority (LA) when a visit requires approval.

Local Authority approval is needed for:

1. **Adventurous activities** – except when run at Sandwell Residential Education Service (SRES) centres or Malthouse Activity Centre and delivered by their staff. For a list of adventurous activities please see section 26.
2. **Overnight stays** – except when at a SRES centre with their staff leading activities.
3. **Overseas visits** – whether wholly or partly abroad.

Key Requirements

- All SMBC establishments must use EVOLVE.
- Applications needing LA approval must be submitted **at least 6 weeks before** the visit.
- For advice or help using EVOLVE, contact the nominated Advisers (see section 4)
- Any documents required by the LA must be retained within the school/establishment and be available for inspection by the LA and/or OFSTED.

Other Visits and Activities
Offsite activities/visits that do not require LA approval still need to be added to EVOLVE but can be approved at school/establishment level. They may still be viewed, sampled or monitored using the database and diary facilities of the system.

6. Local Area Visits (LAV)

Local Area Visits (LAVs) are low-risk, curriculum-based activities that take place within the school's designated Local Learning Area. These visits occur during the normal school day and involve walking as the mode of transport. Specific consent is not required for these visits,



and they can be approved by the EVC if the following conditions are met:

Accessing the Local Area Visits Module on EVOLVE

- All LAVs must be logged on EVOLVE using the Local Area Visit module.
- To access the module, EVCs should contact the EVAs to request activation.
- Before doing so, schools must complete a Local Area Visits policy/operating procedure. An example policy/operating procedure is available in the resources section of EVOLVE.

Define the Local Learning Area

The Local Learning Area and its boundaries must be defined and documented by the school. Common venues include:

- Local places of worship
- Supermarkets or local shops
- Local library
- Local park

Identify excluded venues and activities

Schools must identify, and document excluded venues or activities. These visits or activities must follow the standard Offsite Policy and be added to EVOLVE using the normal process. Examples include:

- Swimming pools
- Any visit requiring transport
- Adventurous activities
- Residential visits

Staffing

- A minimum of two staff members must accompany any group of young people.
- Standard supervision ratios must be followed to ensure effective supervision.
- The staff member in charge must be OEAP Visit Leader trained (both theory and practical components).

Consent and Approval

- Specific consent is not required for Local Area Visits, as long as a completed One-Off Consent Form is held for each participant.
- Schools must clearly communicate the planned Local Area Visit in advance (e.g., via a letter or message).
- Approval is delegated to the EVC and does not require Headteacher sign-off if all conditions are met.

Risk Assessments

- Risk assessments must be completed for the journey, the venue and any individual needs amongst the group.
- If any pupil or accompanying adult has difficulty walking to a venue within the Local Learning Area, staff must seek advice from the Educational Visits Advisers (EVAs) before proceeding.



7. Risk Management

As an employer, Sandwell Council has a legal duty to make sure that risks are managed, requiring them to be reduced to an "acceptable" or "tolerable" level. This does not mean eliminating risks entirely, rather that they are controlled appropriately. This requires having proportionate - suitable and sufficient - risk management systems in place, and providing employees with support, training and resources to apply this policy effectively.

When assessing the risks of an activity, it is important to also consider the potential benefits of participating. SMBC requires a "Risk-Benefit Assessment" approach. This means that the starting point of any risk assessment should be a consideration of the targeted benefits and learning outcomes that will be gained from the activity. By understanding these benefits, you can make an informed decision on whether the residual risks (the remaining risks after control measures are applied) are "acceptable". The Health and Safety Executive (HSE) endorse this approach and advocate young people being exposed to well-managed risks so that they learn how to manage risk for themselves.

There is no specific format required for risk assessments by law or SMBC**,** but there is a requirement for the process to be recorded and for suitable and sufficient measures to be identified to manage any significant risks - those that may cause serious harm to an individual or harm several people.

A full written risk assessment is required in the following circumstances:

1. **Adventurous activities** (any component of an adventurous activity)
2. **Overnight stays**, including at your own school establishment site
3. **Visits overseas** - either wholly or partly overseas
4. **Visits outside of the Local Authority** or more than 3 miles away from your school/establishment where you are located on Sandwell's borders
5. **Where staff need specialist** skills, e.g. swimming.

If a full written risk assessment is not completed, then the relevant Risk Management Checklist/s (available in the resources section of EVOLVE) must be used.

NO VISIT SHOULD TAKE PLACE WITHOUT EITHER A WRITTEN RISK ASSESSMENT OR COMPLETION OF A RISK MANAGEMENT CHECKLIST.

For further information, all users of this policy are recommended to read the OEAP NG **Risk Management** document.

Obtaining Risk Assessments from Providers
You **do not need to obtain copies of risk assessments** from providers as they are written for their own purposes. Your duty of care is to ensure that any provider you use meets acceptable standards, such as the LOtC Quality Badge.

8. Emergency Planning and Critical Incident Support

A critical incident is one where any member of a group undertaking an 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.

For more details, users of this policy are encouraged to read the OEAP NG document: **Critical Incident Management for Visits**

How to Get Emergency Support from SMBC
SMBC provides emergency planning procedures to support schools/establishments if a critical incident occurs. If you need immediate support during an emergency:

1. Call the 24/7 Community Alarm Service:
    a. **+44 (0)121 569 6800**
    b. ask for the Duty Emergency Planning Officer.
2. If there is no answer, call a backup number:
    a. **+44 (0)121 569 6802**
    b. **+44 (0)121 569 6804**
    c. **+44 (0)121 569 6817**

These numbers must be carried by Visit Leaders at all times during an offsite activity/visit but should only be used in the case of a genuine emergency. They must NOT be shared with young people, their parents or guardians.

Emergency Contact Card
An Emergency Contact Card template available in the EVOLVE resources section. This should be completed with all relevant contact numbers and given to all adults involved in the offsite activity/visit.

9. Monitoring

SMBC carries out sample monitoring of school visits and LOtC activities. This may be done by SMBC officers or delegated to schools/establishments. In practice, most monitoring is expected to be done within the school/establishment, carried out through systems managed by the Educational Visits Coordinator. All monitoring should follow the guidance in the OEAP NG.

For more detail, all users of the policy are encouraged to read the OEAP NG document: **Monitoring**.

10. Assessment of Leader Competence

OEAP National Guidance (NG) provides clear advice on assessing leader competence. This SMBC policy requires that all Visit Leaders and accompanying staff are confirmed as competent through the electronic approval process for the responsibilities assigned to them.

For more details, users of this policy should refer to the OEAP NG document: **Approval of Leaders**

11. Role-specific Requirements and Recommendations

OEAP NG sets out clear and detailed responsibilities and functions of specific roles that relate

to roles found within SMBC LA. These are:

1. Director of Children's Services
2. Lead Member(s) for Children's Services
3. Line Manager of an Outdoor Education Adviser (EVA in SMBC)
4. Outdoor Education Adviser (EVA in SMBC)
5. Adviser (other than an OEA/EVA) including Health and Safety Officer
6. Manager of an Outdoor Centre

All users of this policy are recommended to read the individual OEAP NG documents above.

OEAP NG sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within most schools/establishments. These are:

1. Member of Board of Governors or Management Board. It is **strongly recommended** that Governors are made aware of all visits and LOtC activities planned by the school. An appropriately experienced Governor should be further involved in scrutinising applications for approval of the following types of visit:
    a) where a visit involves any component of adventurous activity
    b) where a visit involves an overnight stay
    c) where a visit is taking place wholly or partly overseas.
2. Head Teacher
3. EVC
4. Visit or Activity Leader
5. Deputy Visit leader
6. Volunteer Adult Helper
7. Parent or Carer

All users of this policy are recommended to read the individual OEAP NG documents above.

12. Charges for Offsite Activities and Visits

SMBC Head Teachers/Managers, curriculum planners, EVCs and VLs 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.

For further information, all users of the policy are recommended to read the OEAP NG document: **Charges for Off-site Activities and Visits in an Educational Establishment**

13. Vetting and Disclosure and Barring Service (DBS) Checks

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

For the purposes of this policy:

- *frequently* is defined as once a week or more
- *intensively* is defined as 4 days or more in a month or overnight.



This means that all adults accompanying a residential visit must undergo an enhanced DBS check. However, it must be clearly understood that an enhanced 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 young people 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.

For further information, all users of this policy are recommended to read the OEAP NG document: **Vetting and Disclosure & Barring Service (DBS) Checks**

14. Requirement to Ensure Effective Supervision

The law does not set fixed staffing ratios for specific activities, but it does require supervision and group management to be "effective." However, Ofsted and DfE guidance make an exception for Early Years, where specific supervision ratios are prescribed.

Effective supervision should be determined by proper consideration of:

- age (including the developmental age) of the group
- gender issues
- ability of the group (including learning, behavioural, medical needs, vulnerability 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 and experience.

SMBC prescribes the following **minimum** ratios for supervision:

Age	Minimum staffing ratio
Under 5s	1:5
Year 1 and 2	1:6
Year3	1:10
Years 4 to 6	1:15
Years 7 to 13	1:20
Students aged 18 and over	1:20

Please Note:

1. These ratios may not always ensure effective supervision. Consider the factors listed above when deciding the appropriate level of supervision.

2. If an activity is governed by a National Governing Body (NGB), for instance British Canoeing, their minimum ratios should also be taken into consideration.

3. SMBC requires at least two adults in charge of any group, regardless of the age of the

children or young people.

a) If the visit is abroad, both the Visit Leader and Deputy should be teachers or senior youth officers and both should be VL trained.
b) An exception is in place for Bikeability Level 2.

For further information, all users of this policy are recommended to read the OEAP NG document: **Ratios and Effective Supervision**

Types of supervision

The type of supervision should be based on a risk assessment considering the nature of the offsite activity/visit, age, location, and ability of the students etc.

Direct Supervision

- Supervisors must always remain in **visual contact** with young people.
- Double head counts should be completed regularly, regardless of the length and nature of the visit, and especially before leaving a venue.
- Supervisors must carry a full list of participants (young people and adults)
- Young people, particularly where under 5 or in Years 1 to 3, **should be easily identifiable** - especially if the visit is to a densely populated area. Brightly coloured caps, t-shirts or a school uniform can help identify group members more easily.
    - **Do not use name badges**, but badges with the school/establishment name and emergency contact number are acceptable.
- The VL must set **rendezvous points** and tell young people what to do if they become separated from the group.

Indirect Supervision

Occurs when a group explore within clearly identified and agreed boundaries or engage in an activity away from direct adult supervision. For example:

- small group or individual work within a gallery, museum, cultural or historic site or city.
- time between more structured activities during a residential visit.

This should be managed such that in an emergency or changed circumstances, it should not be a difficult or lengthy process to re-establish direct supervision. Key requirements:

- Inform parents of this form of supervision,
- Define clear geographical boundaries within a suitable area and ensure everyone understands them.
- Set a time limit for returning to an agreed location.
- Ensure young people are in 'buddy groups' of at least 4 and know to stay together.
- Briefing students on leader locations (some fixed, some roaming within the agreed area)
- If students get lost, they should know to stay together and wait for a leader to find them.



- If abroad, ensure students carry a small briefing card in the local language.
- On a residential visit, ensure students know the location of their hotel / accommodation. Carrying a hotel card from reception is simple and effective.

Remote Supervision

Used for Duke of Edinburgh Award or other unaccompanied expeditions. The aim of visits for older participants may be to encourage independence and investigative skills.

- The Visit Leader should assess the competence of young people during the planning stage.
- The Visit Leader remains responsible for young people even when not in direct contact.
- Parents/carers must be told before the visit if any form of remote supervision will take place.

For further information, all users of the policy are recommended to read the OEAP NG document: **Group Management and Supervision**

Note: Bikeability Level 2

Schools can choose for Sandwell's approved provider to take full responsibility for supervising offsite delivery. However, it is **strongly encouraged** that at least **one** member of school staff should accompany groups where possible for support and monitoring. That member of staff does not need to be Visit Leader trained.

Whenever Bikeability sessions take place offsite:

1. Emergency arrangements and responsibilities must be understood by all parties. An emergency contact at school must be available and ready to respond; they must know the children in the group(s) and the route being taken.

2. A documented risk assessment must be completed.

If schools/establishments decide not to directly supervise groups offsite, the following conditions must also be met:

3. It must be clearly communicated to parents/carers and students that school staff are not supervising the groups off site.

4. School staff must continue to supervise children that need additional support.

5. Schools are responsible for checking that staffing ratios for the session(s) provide adequate supervision.

OEAP National Guidance **(section 4.4h Using External Providers)** specifies that schools retain overall duty of care even when external providers are used, and school staff retain responsibility for supervision and welfare

All offsite activities, including Bikeability sessions, must be recorded on EVOLVE and approved at Head Teacher level.

15. Preliminary Visits

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 needs. This information is essential for planning effective supervision and managing risk.

If the venue is new to the Visit Leader (VL) or the school/establishment, a preliminary visit is strongly recommended. For venues previously used by the VL or school/establishment, a phone call to check for any changes is usually sufficient.

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

- LOtC Quality Badge
- AALA licensing
- Adventuremark
- NGB centre approval schemes (applicable where the provision is a single, specialist activity).
- AHOEC Gold

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

For further information, all users of this policy are recommended to see section 24 Using Outside Organisations and read the OEAP NG document: **Selecting External Providers and Facilities**

16. Insurance Arrangements

- Schools/establishments should take out or ensure suitable insurance is in place for all offsite activities to provide **personal accident** and **cancellation** cover.
- Establishments are responsible for checking that the policy in place covers all activities in which they will be participating.
- If using SMBC's School Journey Policy, it is designed to provide cover to all participants on the trip: pupils, teachers, other school staff and volunteers.
- Employees and volunteers assisting with SMBC activities are covered under Public Liability and Employers' Liability while acting in the course of business. In an offsite scenario:
    - Injuries caused by SMBC negligence → Employers' Liability responds.
    - Injury or loss to third parties caused by staff/volunteers → Public Liability responds.

Insurance – external service providers

- Establishments must check that transport providers (coaches, taxis, minibuses etc), as well as those providing activity resources, have insurance arrangements in place to cover the period of the proposed activity.
- Evidence can include policy documents (Motor and Public Liability Insurance), or

broker confirmation that the business activity provided is covered by the business description within policy documentation.

- A minimum of £5 million public liability cover is acceptable in most cases; at least £10 million is preferred for higher risk activities.

For more details, users of this policy are encouraged to read OEAP NG document: **Insurance**

17. Inclusion

Every effort should be made to ensure that offsite activities and visits are accessible to all vulnerable groups, and regardless of special educational or medical needs, ethnic origin, gender or religion. Where a visit involves young people with special needs, every reasonable effort should be made to find a venue that is suitable, accessible, and enables the whole group to participate fully.

Establishments should take all **reasonably practicable measures** to include every young person. The principles of inclusion should be embedded in all visits and reflected in establishment policy, aiming for:

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

Employers, Head Teachers/Managers, curriculum planners, EVCs and VLs should be aware of the extent to which inclusion is or is not a legal issue. Under the Equality Act 2010, it is unlawful to:

- treat a disabled person less favourably
- fail to take reasonable steps to avoid placing a disabled person at a substantial disadvantage without justification.

For further information, all users of the policy are recommended to read the OEAP NG document: **Inclusion**.

18. Good Practice Requirements

To be deemed competent, an SMBC Visit Leader (VL) must 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.

Competence Standards (OEAP NG, by which SMBC leaders must work): A competent Visit/Activity Leader (or an Assistant Leader where they may take sole responsibility for a sub-group) requires:

- **Knowledge and understanding of their employer's guidance** supported by establishment-led training. It is good practice for employers to provide formal and accredited training to support their guidance e.g. EVC Training, VL Training and such training may be a requirement prescribed by some employers.
- **Knowledge and understanding of establishment procedures** supported by a structured induction process specified by the establishment.

- Knowledge and understanding of the **group, the staff, the activity and the venue**.
- **Relevant experience**
- In some circumstances (e.g. first aid, adventurous activities) a **formally accredited qualification.**"

SMBC Requirements

- VL Training is mandatory (see section 4)
- VL's are responsible for completing risk assessments (see section 7).
- Establishments should verify original qualification documents (not photocopies).
- Competence checks must be applied rigorously to newly qualified or newly appointed staff.
- Staff participating in offsite activities and visits must be aware of the extent of their duty of care and should only be given such responsibilities in keeping with the above guidance.

Volunteer Helpers
Where a volunteer is a parent or has a close relationship with a participant, the volunteer should be made aware of the potential for their relationship to compromise the VL's plans for group management. The VL must address potential conflicts in the risk-benefit assessment.

For further information, all users of this policy are recommended to read the OEAP NG document: **Good Practice Basics**.

19. Transport

- **Planning:**
  Transport arrangements must be carefully planned. Statistics demonstrate that travel to an activity presents greater risk than the activity itself. All national and local regulations, as well as SMBC's Transport Policy, must be followed.
- **Supervision:**
  The required level of supervision during travel should be determined as part of the risk assessment, considering factors such as driver distraction and the needs of the passenger group.
- **Vehicle Hire:**
  The Visit Leader should ensure that vehicles are hired from a reputable company. When selecting a new provider, schools/establishments should use the "Transport Provider Questions" document available in the EVOLVE resources section.
- **Public Transport:**
  While cost-effective and environmentally friendly, public transport requires careful planning and is generally suitable only for small groups. Include this in the risk management process.
- **Private Cars:**
  Transporting young people in private cars requires thorough consideration and documented procedures.

For further information, all users of this policy are recommended to read the suite of OEAP NG **Transport** documents.



20. Planning

Planning must comply with legal obligations and good practice by ensuring:

- The plan aligns with the establishment's procedures and employer policy.
- All staff, volunteers, and participating young people understand their roles and responsibilities, including involvement in risk management.
- Parents/carers are fully informed and, where required, formal consent is obtained.
- Appropriate assurances are secured from providers, using reputable accreditation schemes where possible.
- Designated emergency contact(s) are available 24/7 for the duration of the visit/activity.
- Emergency contacts have full access to all activity details throughout the period of the activity / event.

Early Planning Recommendation:
At the outset, it is strongly recommended that the provisional staffing team should identify the intended benefits and learning outcomes of the activity / activities. To meet Ofsted expectations for rigorous evaluation, these outcomes should be prioritised, clearly recorded and targeted. This record will help maintain focus and support effective risk management.

21. First Aid

It is **strongly recommended** that at least one qualified first aider from the school/establishment accompanies each visit. As part of the school/establishment's First Aid Needs Assessment, the Head Teacher/Manager or the VL should decide on the following, based on the group, their needs, the journey and the activities:

- the appropriate level of first aid qualification,
- the number of first aiders who will accompany,
- the number of suitably stocked first aid boxes required.

For further information, all users of this policy are recommended to read the OEAP NG document: **First Aid**

22. Safeguarding

All adults in a supervisory role on any offsite activity or visit — whether staff or volunteers — must know the correct actions to take if they encounter an actual or suspected case of child abuse. They should have a working knowledge of the establishment's safeguarding procedures.

Any disclosure of abuse must be taken seriously and handled according to these procedures. Adults working with children can be vulnerable to allegations, so it is extremely important to avoid situations that could be misinterpreted or misunderstood. Wherever possible, no adult should be alone with a young person.

All staff members must have appropriate DBS clearance. On residential visits **all** adults **must** have been cleared by the DBS.

When taking photographs during offsite activities, use a school/establishment device wherever possible. If photos are intended for publicity, written permission from parents/carers is required. Photos must never be misused or published online without explicit parental consent.

23. Communicating with Parents/Carers

Sharing Information

1. **Notification of Visits**
   Parents/carers must be informed in writing about any offsite activity or visit, **except** where it is a regular part of the curriculum and they have already been notified by other means.
2. **Residential, Overseas, or Adventurous Activities**
   - Parents/carers should be invited to a briefing meeting before such visits.
   - Written details of the activity must be provided.
   - Alternative arrangements should be made for those unable to attend or who have difficulty with English.
3. **Transport in Private Vehicles**
   - Parents/carers must be told if a young person will travel in a private vehicle driven by an adult or another young person.
   - Head Teachers/Managers should decide if written consent is required for this.
4. **Early Return Due to Misconduct**
   - The VL must inform parents/carers if they could be asked to fund the early return of a young person for behavioural reasons.
   - A written agreement may be necessary.

For further information, all users of this policy are recommended to read the OEAP NG document: **Parents and Guardians**

Consent Forms

The Department for Education (DfE) has created a one-off consent form for parent(s) (or those with parental responsibility) to sign upon a child's school enrolment. An SMBC version of this form is attached as Appendix A to this document. This form only needs to be completed once on enrolment to the school unless additional questions are added, in which case it should be sent out at least annually. Additional information collected might be medical information for young people or contact details for parents.

For Nursery and Early Years children, consent should be sought for each visit. You may use a tear-off slip at the bottom of a letter for this as long as a completed One-Off Consent Form is also held and the activity does not fall into one of the higher risk categories of overseas, residential or adventurous activities.

Specific Consent (Appendix B) is required for the following:

- adventurous activities (including swimming in pools not managed by Kore Sandwell (formerly Sandwell Leisure Trust))
- residential visits
- visits abroad.

Specific Consent should also be considered for:



- visits outside of the Local Authority (normally Sandwell) or more than 3 miles from the school/establishment.
- swimming in pools managed by Kore Sandwell

If parents/carers refuse consent, the young person should not participate in the activity, though alternative arrangements should be made to meet the visit's educational objectives wherever possible.

If parents/carers give a conditional consent, the Head Teacher/Manager will need to consider whether the young person may be taken on the visit or not.

Self-consent
Anyone in education who is 18 or over may sign their own consent form (this should be the same type of consent form as the rest of the group) but they remain subject to the same supervision ratios (see section 14).

Electronic / Paper Consent Forms
It is the Local Authority's preference that consent is obtained using a paper-based version of the forms mentioned above. However, where schools/establishments opt to use electronic methods for collecting consent, they must ensure that the following conditions are met:

- The electronic consent form must include all information required on the paper version of the One-Off or Specific Consent Form.
- Robust measures must be in place to guarantee that electronic consent is accessible at all times during the offsite activity, especially in remote areas or locations with limited mobile network or Wi-Fi connectivity.
- Before the visit, schools/establishments should confirm with the nearest accident and emergency facility (relevant to the location they are visiting), that they will accept and act on electronic consent in the event of an emergency.

For further information, all users of the policy are recommended to read the OEAP NG document: **Parental Consent**

24. Using Outside Organisations

Schools and establishments must either:

- Use an activity provider with the LOtC Quality Badge, or
- Send a Provider Statement to the activity provider confirming responsibilities, insurance, and other key details.

A Provider Statement is only required the first time you use a provider, but you should regularly check that the information remains current. A blank Provider Statement template is available in the EVOLVE resources section.

You **do not need to obtain copies of risk assessments** from providers as they are written for their own purposes. Your duty of care is to ensure that any provider you use meets acceptable standards, such as the LOtC Quality Badge.



25. Adventure Activities Licensing Regulations

Employers, Head Teachers/Managers, EVCs and VLs 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 overseen by the DfES, the scheme is now under the direct responsibility of the Health and Safety Executive (HSE).

Key points for Visit leaders (VLs)

- An AALA licence provides assurance that the provider meets required safety standards.
- The licence does not guarantee the educational value or quality of the activities.
- Where SMBC's residential and activity centres deliver activities that fall "in scope" under the regulations, they must hold a valid AALA license.

For further information, all users of this policy are recommended to read the OEAP NG document: **Summary of Adventurous Activity Licensing Regulations**

26. Types of Visits

Certain activities require LA approval, which must be obtained in advance. Approval will only be granted if the VL demonstrates that appropriate planning, risk assessments and emergency procedures etc are in place.

Approval Process:

Approval should be sought at least **six weeks** before the offsite activity/visit is due to take place. This timeframe allows the LA to complete essential checks, including:

- Staff training and qualifications
- insurance arrangements
- DBS.

A list of activities requiring approval follows:



Activities Requiring Approval

CLIMBING	TREKKING	CAVING
• Climbing (on any surface) • Gorge walking • Ghyll scrambling • Sea level traversing / coasteering • Abseiling	• Mountaineering • Hill walking (open country) • Fell running • Orienteering (open country) • Cycling (open country)	• Caving • Potholing • Mine exploration
WATERSPORTS	**SNOWSPORTS (inc Dry Slopes)**	**OTHERS**
• Canoeing • Kayaking • Dragon boating • Wave skiing • Rafting • Paddle boarding • Sailing • Sail boarding • Wind surfing • Water skiing • Powered safety / rescue craft • Diving from a raised platform • Diving or swimming with breathing apparatus • Swimming/paddling in natural water • Swimming in pools not managed by Kore Sandwell	• Skiing • Snowboarding • Tobogganing • Bobsleighing • Sledging	• Camping in open country (including bivouacking) • Air activities (excluding commercial flights) • Shooting • Archery • Motor sports including go-karts and quad bikes • Ropes courses • Paintballing • Horse riding / pony trekking • Axe throwing

'Open country' is normally defined as land above 300m in elevation or more than 1 kilometre from vehicle access. However, this definition is not absolute; there may be circumstances where this definition is inappropriate. If you think this applies to your planned activity, please contact the LA for guidance.

Adventure activities using AALA licensed providers

For further information, all users are recommended to look at section 25 of this policy and to read the OEAP NG document: **Adventurous Activities**

- The AALA licence only covers safety for the licensed activities.
- Other aspects of provision — such as catering, accommodation, and non-licensed activities — are not included in the licensing scheme.
- These elements must be checked separately by the Visit Leader (VL).

Adventure activities using non- AALA licensed providers

Not all providers are required to hold an AALA licence. The following are exempt:

- Voluntary bodies providing activities for their own members
- Schools providing activities for their own pupils
- Commercial organisations and LAs where activities fall outside the scope of the regulations.

In some cases, a provider or the activity may simply not require a licence.

Other Accreditation Schemes:

Many providers are accredited under non-statutory schemes operated by organisations such as the Wales Tourist Board or certain National Governing Bodies. Schools/establishments/LAs can contact these accreditors to confirm a provider's management of safety. The British Activity Holiday Association can provide advice on accreditations.

Using Non-Licensed Providers:

If you propose to use a provider that does not hold an AALA licence and does not have an LOtC Quality Badge, as per section 24, you must obtain a completed Provider Statement before proceeding.

Other issues to consider with all adventure activity providers

Visit Leader (VL) Responsibilities:

- Confirm and agree with the provider on arrangements for supervision and recreation during evenings and between adventure activities.
- Share relevant group information with the provider, such as age range, competence, and any specific needs.
- Ensure clear handover and handback procedures are in place for all activities.

Ultimate Responsibility:

- The VL and accompanying staff retain **overall responsibility for the young people at all times**, even when the group is under instruction by the provider's staff.
- The provider is responsible for the safe delivery of the activity, but school/establishment staff must remain vigilant.
- All parties - including young people - should understand the **roles and responsibilities** of both school/establishment staff and provider staff.



Before Activities Begin:

- The VL and staff must have sufficient information about the activity in advance.
- If concerns arise that the young people may be at risk, they should approach the instructor at an appropriate and safe interval.

Assurances to Seek from the Provider:

- Staff suitability checks, including temporary workers
- Clearly defined the staff roles and responsibilities
- Adequate security arrangements
- Appropriate public liability insurance

School/service led adventure activities

If a member of the school/service staff is organising, leading and instructing young people on adventure activities, they should complete the checks set out under section 20. The VL must satisfy the LA and the Head Teacher/Manager that:

- the VL and other supervisors are competent to act as leaders and/or instructors of young people in the activity – bearing in mind that some of these young people may be novices.
    - Competence should normally be demonstrated by holding the relevant NGB award where it exists.
    - The relevant NGB can advise on appropriate qualifications.
- the VL is competent in safety procedures and the planning of adventure visits,
- an appropriate risk assessment has been completed,
- the supervision will be appropriate for the activity and group,
- there is adequate first aid provision, including trained personnel and appropriate equipment within the group,
- emergency procedures include activity-specific measures and that supervisors are competent to carry them out,
- all equipment is suitable, safe and in good condition,
- every young person is suited to the activity and is properly prepared and equipped.

Employing Freelance Providers
Schools/services that choose to employ, rather than contract with, an unlicensed freelance provider of adventure activities – who would otherwise need a licence to trade – assume full legal responsibility for all aspects of the activity.

If the provider, in the employment of the school/service, provides licensed facilities to the pupils of another school or members of another service, the employing school/service will need a licence.

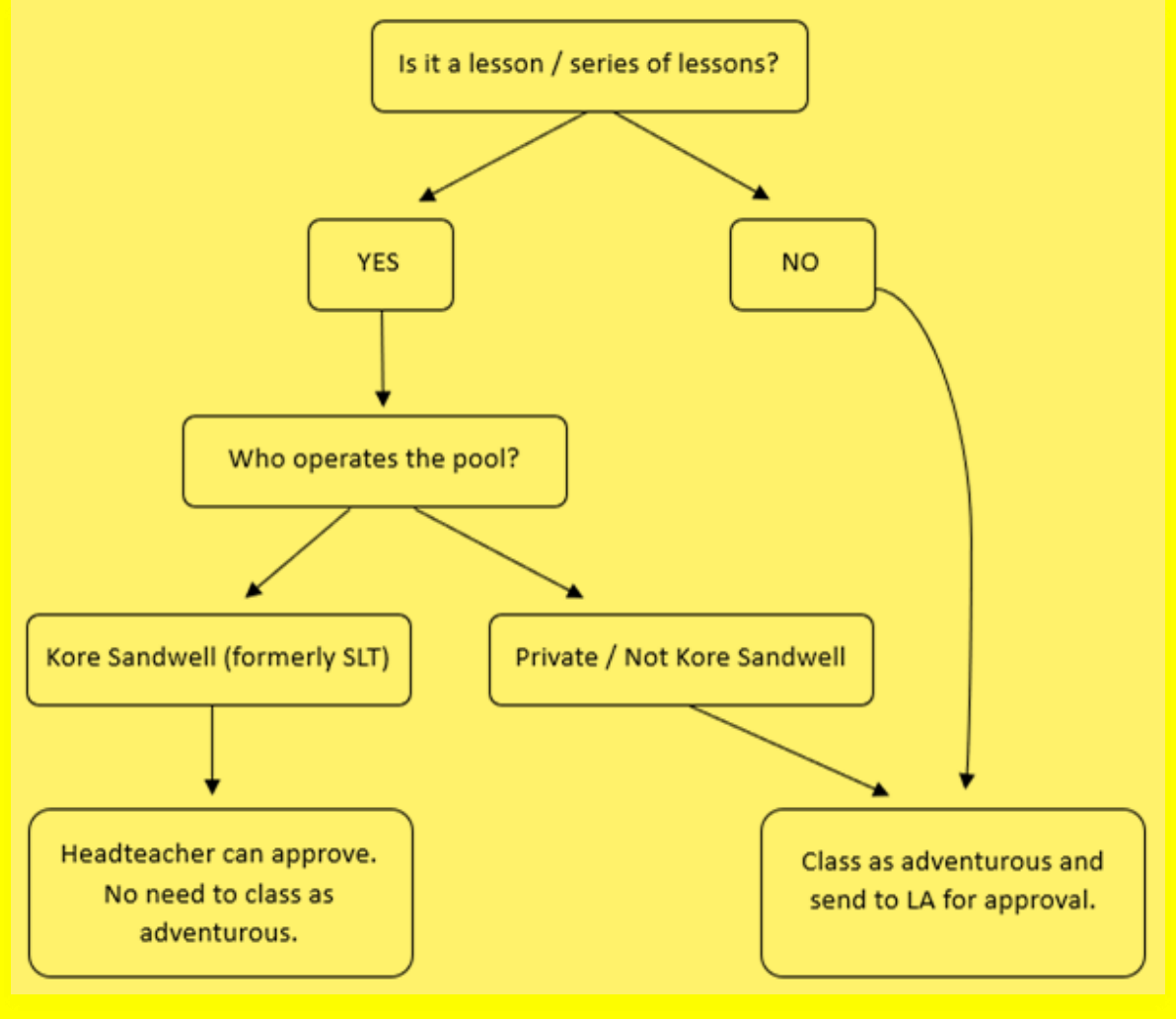
27. Swimming or paddling in the sea or other natural waters

Swimming or paddling in the sea or other natural waters is a potentially dangerous high-risk activity for a group of young people and should be categorised as an adventurous activity on EVOLVE. As such, these applications need to come to the LA for approval.

For further information, all users of this policy are recommended to read the OEAP NG document: **Natural Water Bathing**

28. Swimming Pools

Whether a visit needs to come to the LA for approval, depends on the nature of the swimming and where it is taking place:



Head Teachers/Managers and LA Officers will be aware of their local swimming pool facilities for curricular activities. VLs should follow the recommended safe supervision levels at the pool for young people.

Pools Not Managed by Kore Sandwell (formerly Sandwell Leisure Trust): Using a pool not managed by Kore Sandwell is classed as an adventurous activity and requires LA approval.

Pools Not Used Before or using Non-LOtC Pools: If using a pool for the first time, or a regularly used pool that doesn't hold an LOtC Quality Badge, you must obtain a Swimming

Provider Statement. A blank Swimming Provider Statement is available in the resources section of EVOLVE

Parental Consent: Does not replace the need for VLs to check each young person's swimming ability.

Supervision Responsibilities: Agree in advance how supervision will be shared between lifeguards and visiting staff. Accompanying staff must understand the pool's normal operating procedures, risk assessments, and emergency action protocols, and confirm poolside supervision arrangements at the time of booking.

For further information, all users of this policy are recommended to read the OEAP NG document: **Swimming pools**

29. Pop-Up Swimming Pools

Following an extensive consultation by Corporate Health & Safety, the Council has reviewed the use of pop-up pools in schools. Key findings include:

- The pop-up pool industry is unregulated. This brings the risk of schools contracting providers that may not have the required competencies to run a pool safely.
- No professional swimming or pool safety bodies currently endorse the use of pop-up pools.
- The Councils insurance programme does not cover the use of pop-up pools on its premises.
- Provider contracts often place significant liability on schools if incidents occur.

For these reasons, **the Council cannot support or endorse the use of pop-up pools** within Sandwell at this time.

30. Visits Abroad

Travelling abroad can be highly rewarding, but it requires careful preparation. While much of the earlier guidance applies, additional factors must be considered because legislation and requirements may differ from the UK.

Essential Checks

Passports requirements & Brexit Changes: Confirm requirements for your destination at https://www.gov.uk/browse/abroad/travel-abroad.

- **Visas**: Check visa requirements for all participants, especially non-UK nationals.
- **Settled Status**: Ensure all participants have established UK immigration status. An eVisa share code may be required for re-entry. An 'eVisa' will provide online proof of immigration standing and this can be evidenced to customs staff by way of a 'share code'

Additional Considerations:



- If visiting a non-English-speaking country, ensure at least one adult can communicate effectively and understands local culture.
- If a child is subject to a care order, foster parents will need to make sure that the Social Services Department consents to any proposed trip
- If a young person is a ward of court, the Head Teacher/Manager should seek advice from the court in relation to journeys and activities abroad well in advance.
- All participants should carry sufficient local currency for essentials (e.g., phone calls).

Air Travel:

- Plan carefully for group air travel. Confirm requirements with the airline/tour operator.
- If the group includes any members with disabilities, it is advisable to check that the airline can meet their needs.
- The VL should resist any attempt by the airline to split the group across different aircraft.

Visits abroad can be made in a number of ways:

Organising your own visit

A Head Teacher/Manager or a VL may decide to organise a package abroad without the help of an outside body. Package organisers have responsibilities under directive 90/314/EEC, implemented in the UK through the Package Travel, Package Holidays and Package Tours Regulations 1992 (The Package Travel Regulations). These regulations apply to packages sold or offered for sale in the UK. They define a package as a combination of any two of accommodation, transport, or other tourist services not ancillary to transport.

Most package arrangements come within the scope of the regulations unless they are 'occasional' or part of an educational course programme as compared with a leisure activity such as skiing.

Organising your own transport

Driver Familiarity:
VLs must ensure that any driver transporting groups abroad is fully familiar with operating the vehicle in all countries being visited, as well as those passed through en route.

EU Regulations:

- Vehicles used for international journeys must be fitted with a tachograph.
- Drivers must comply with EU rules on maximum driving hours and minimum rest and break periods.
- These regulations apply to most drivers of school or service passenger vehicles undertaking international travel.

Licence Requirements:
Different driving licence requirements may apply when driving abroad. VLs should confirm that drivers hold the correct licences for all relevant countries.



Factors to consider when travelling abroad include:

Legislation and Regulations

- Be aware that different laws may apply to drivers' hours and record keeping, especially in non-EU countries.
- EU drivers' hours and tachograph regulations normally apply to any vehicle with 9 or more passenger seats on journeys through EU countries and some countries outside the EU.
- In other countries, drivers must observe the domestic rules of the countries being visited. Advice on domestic rules may be obtained from the relevant embassies.

Vehicle Documentation

- Special documentation is required for minibuses taken abroad. Ensure all paperwork is complete before departure.

Traffic and Safety

- All group members should be aware of unfamiliar right-hand-drive traffic.
- UK minibuses and coaches may have passenger doors that do not open on the kerb side in countries where traffic drives on the right. Extra care is needed when boarding or alighting, and detours may be necessary to ensure safety.

Vehicle Capacity and Loading

- Confirm that the vehicle's carrying capacity and loading requirements are adhered to throughout the journey.

Using tour operators

Before using a tour operator, VLs should ensure that the provider holds the LOtC Quality Badge. If they don't hold this badge, then an Overseas Provider Statement needs to be sent out for completion. A blank Overseas Provider Statement is available in the resources section of EVOLVE. The Civil Aviation Authority (CAA) licenses travel organisers and tour operators selling air seats or packages with an air transport element (Air Organiser's Licence or ATOL). The licence is a legal requirement and provides security against a licence holder going out of business.

Planning and preparation

It is good practice that an exploratory visit to the location should be made. If this is not possible, the VL should gather as much information as possible on the area to be visited and the facilities available from:

- the provider
- the Foreign and Commonwealth Office's Travel Advice Unit
- other schools/groups who have used the facilities or have been to the area,
- the LA/schools in the area to be visited,
- embassies/consulates
- tour operators,
- the internet, books and magazines.



Information to be taken on visit

The VL should make sure that they obtain and take with them:

- travel tickets, passports and visas. VLs should check the requirements of individual countries with regard to passport validity
- eVisas and share codes for non-UK nationals where relevant (see above)
- it is also advisable to carry a separate list of the numbers of any travel documents/passports, and photocopies of all the group's documents
- copy of the contract with the centre/hotel etc, if appropriate
- medical papers eg GHIC and significant medical histories,
- consent forms and permission for VL to authorise emergency treatment on behalf of parents/carers,
- phone numbers at home and work, of the Head Teacher/Manager and of the home-based contacts,
- names of parents/carers and the addresses and telephone numbers at which they can be contacted (home and workplace),
- copies of a list of group members and their details,
- details of insurance arrangements and the company's telephone number,
- name, address and telephone number of the group's accommodation,
- location of local hospital/medical services.

The VL may wish to ask parents for passport size photographs of the young people. It might be useful to have photographs of the adults in the group as well.

Information retained at the school/establishment

Full details of the visit should be retained at the school/establishment while the visit is in progress. This should include:

- itinerary and contact telephone number/address of the group,
- list of group members and their details,
- names, addresses, telephone numbers of the parents/carers and next of kin,
- copies of consent forms,
- copies of travel documents, insurance documents, medical papers,
- copy of the contract with the centre/hotel etc, if appropriate.
- LA emergency contact numbers.

It is the Head Teacher's/Manager's responsibility to ensure that this information is available at all times. This is particularly important if the visit takes place when the school/establishment is closed.

Emergencies

The VL must ensure that all members of the group know what action to take if there is a problem.

- British Embassy and Consulate Information: The VL and accompanying staff should know the location and contact details of the nearest British Embassy or Consulate.
- Depending on the age and maturity of participants, it may be appropriate to provide them with this information as well.



- Home-based support: It is advisable to have a designated staff member or contact at home who holds a valid passport and is prepared to travel to the destination if additional support is required during an emergency.

For further information, users of this policy are recommended to read the OEAP NG document: **Overseas Visits**

In addition to the information above, SMBC requires that both the VL and DL should be teachers or senior youth officers and both should be VL trained.

Exchange visits

The success of an exchange visit largely depends on good relationships and communication with the partner school/establishment.

Individual school/establishment exchanges differ from other visits abroad in that young people will spend most of their time with host families and are, therefore, not always under the direct supervision of staff. Host families will not be subject to English law.

For further information, users of this policy are recommended to read the OEAP NG document: **Exchanges and Home Stays**

31. Expeditions, including Duke of Edinburgh Award

Expeditions provide challenges that take individuals out of their comfort zone. In SMBC, applications of this nature will automatically come to the LA for approval as they include adventurous activities and a residential element or travel abroad.

Unaccompanied expeditions, such as those forming a part of The Duke of Edinburgh Award Scheme, can bring significant benefits including leadership, teamwork, self-motivation, self-reliance, communication, confidence, resilience and consideration for others.

Please see **this document (pdf)** for details of the training/qualifications required to deliver the expedition element of the Duke of Edinburgh Award.

For further information, users of this policy are recommended to read the OEAP NG documents: **Unaccompanied Expeditions** and **Duke of Edinburgh's Award Expeditions**

32. Sandwell's Residential Education and Outdoor Activity Centres

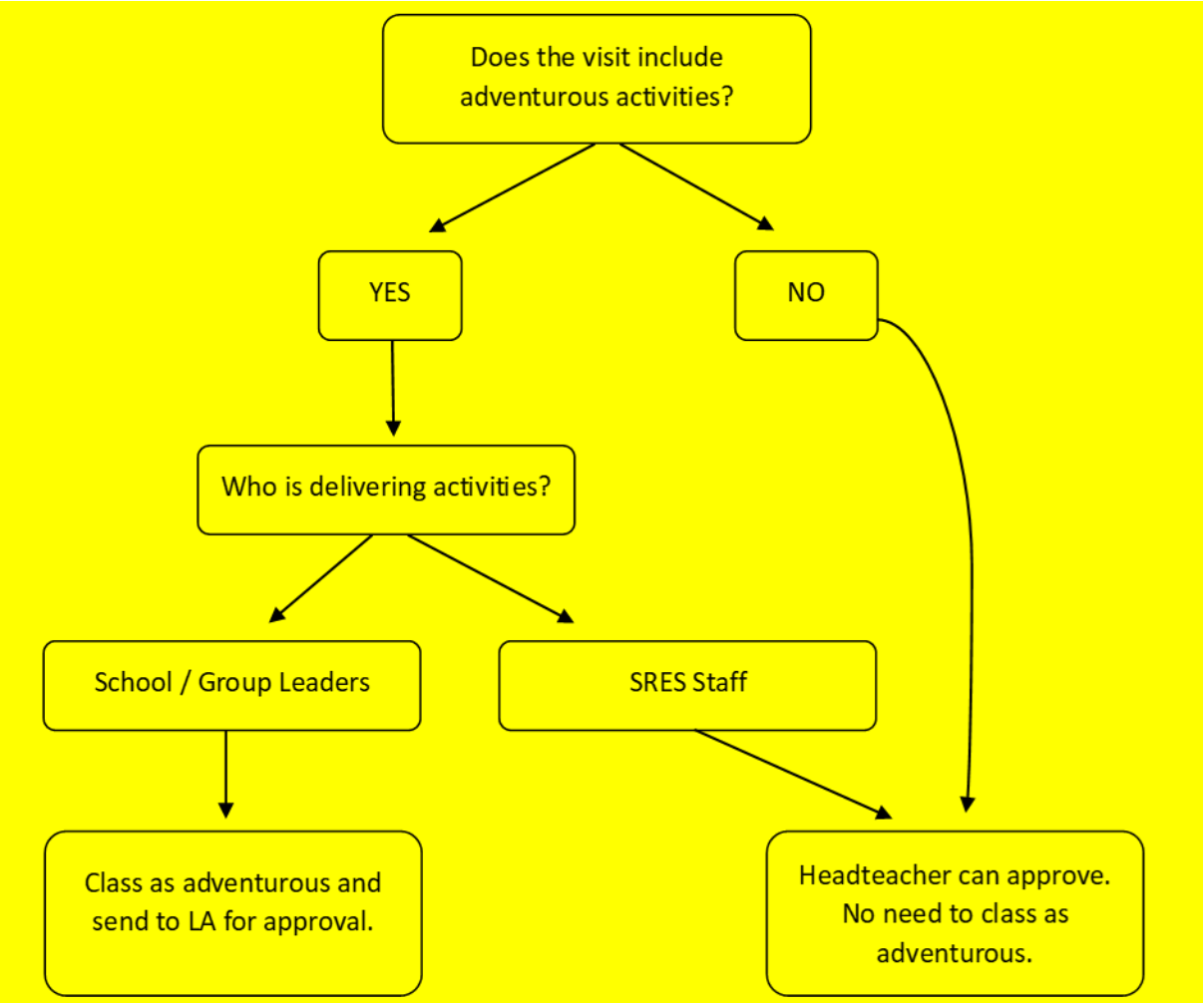
This section applies only to visits to the following Sandwell Residential Education Service (SRES) centres:

- Plas Gwynant Outdoor Education Centre
- Ingestre Hall Residential Arts Centre
- Frank Chapman Outdoor Education Centre
- Edgmond Hall Centre for Outdoor Learning

The following considerations also apply to Malthouse Outdoor Activity Centre (Youth Service facility).



Because these centres are owned and run by SMBC and staffed by Sandwell employees, some of the usual checks and risk assessments will have been carried out or will be carried out by the centre staff. You do not need to request copies of centre risk assessments.



The VL can be assured that:

- all centre staff are trained with regard to safeguarding procedures,
- all centre staff are appropriately vetted,
- there will be no need to check the centre accommodation's suitability (if applicable)
- any equipment provided by the centre will be suitable for the purpose
- risk assessments of centre organised activities will be carried out by centre staff.

The VL must:

- make sure that the programme of activities to be carried out on the visit is agreed in advance with the centre, including any potential modifications where circumstances change,
- agree any division of responsibility between centre and school/establishment staff

before the visit takes place, including responsibility for any risk assessments,
- make sure that the children take suitable personal clothing as recommended by the centre,
- ensure appropriate transport arrangements
- inform parents/carers in the normal way and collect completed consent forms,
- complete the electronic application to ensure that the activity is appropriately approved.

33. Evaluation

As a minimum, all school/establishment visits should be reviewed using the evaluation function on EVOLVE. Once an offsite activity/visit has concluded, EVOLVE will automatically prompt VLs to complete an evaluation. This prompt takes place 7 and 14 days after the visit.

For further information, users of this policy are recommended to read the OEAP NG document: **Self-Evaluation and the Ofsted Framework**

34. List of Acronyms & Initialisms

AALS	Adventure Activities Licensing Service
AALA	Adventure Activities Licensing Authority
AHOEC	Association of Heads of Outdoor Education Centres
ATOL	Air Travel Organiser's Licence
CAA	Civil Aviation Authority
DBS	Disclosure & Barring Service
DL	Deputy Leader
DfE	Department for Education
GHIC	Global Health Insurance Card
EC	European Commission
EU	European Union
EVC	Educational Visits Coordinator
HSE	Health & Safety Executive
LA	Local Authority
LAV	Local Area Visit
LOtC	Learning Outside the Classroom
MBC	Metropolitan Borough Council
NG	National Guidance
NGB	National Governing Body
OEAP	OEAP is the working name of The Association of Advisers for Outdoor Learning and Educational Visits
SLA	Service Level Agreement
SMBC	Sandwell Metropolitan Borough Council
SRES	Sandwell Residential Education Service
VL	Visit Leader