



# OFFSITE VISITS POLICY

SHINE Multi Academy Trust

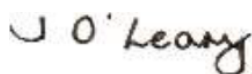
### Management log

Document	Offsite Visits Policy
Author	G Barlow DSL
Person responsible for the document	DSL Group
Date approved	11 <sup>th</sup> March 2025
Date issued	4 <sup>th</sup> April 2025
Review period	2 Years
Next review	Spring 2027

Signed



Signed



Chair of the board

CEO

### Related Policies

#### Policy

- Health and Safety
- Complaints

*All above policies are available through our academies local servers, directly through SHINE or through the Trust website [www.shine-mat.com](http://www.shine-mat.com)*

## Contents

1. Equal opportunities statement .....	3
2. Policy overview .....	3
3. Legal framework .....	3
4. Duty of care.....	4
5. Provision of OEAP national guidance .....	4
6. Approval for visits .....	5
7. EVOLVE.....	7
8. Notification of visits .....	7
9. Process of approval and notification .....	7
10. Roles and responsibilities .....	9
11. Ensuring understanding of basic requirements .....	13
12. Planning the visit.....	14
13. Parent / carer consent .....	14
14. Risk Assessments .....	16
15. Charges for off-site activities and visits .....	17
16. Vetting and DBS checks.....	17
17. Initial visit.....	18
18. Using external providers and facilities.....	18
19. Adventure Activities and Licensing Regulations .....	22
20. First aid .....	23
21. Competence to lead.....	24
22. Requirement to ensure effective supervision.....	25
23. Pupils with medical needs .....	27
24. Inclusion.....	28
25. Travel and transport .....	29
26. Travel by coach, minibus and private car .....	29
27. On foot.....	29
28. Briefing for pupils prior to the visit.....	29
29. Medication .....	30
30. Accidents and Incidents .....	30
31. Emergency Procedures .....	30
32. Figure 1 Categories of activity and levels of approval .....	<b>Error! Bookmark not defined.</b>
33. Figure 2 Definition of adventurous activities – all require shine approval on EVOLVE Adventurous Activities covered by AALA Licensing .....	33

## 1. Equal opportunities statement

1.1 SHINE Multi academy Trust (SHINE)<sup>1</sup> is committed to promoting equal opportunities and everyone will receive equal treatment regardless of age, disability, gender reassignment, marital or civil partner status, pregnancy or maternity, race, colour, nationality, ethnic or national origin, religion or belief, sex or sexual orientation (protected characteristics).

## 2. Policy overview

2.1 SHINE acknowledges the educational value of off-site visits, outdoor learning and related activities to young people, and requires all such events to be properly planned, managed and approved.

*‘When planned and implemented well, learning outside the classroom contributed significantly to raising standards and improving pupils’ personal, social and emotional development.’*

(Ofsted – ‘Learning Outside the Classroom: How far should you go?’, 2008,  
<http://www.lotc.org.uk/wp-content/uploads/2010/12/Ofsted-Report-Oct-2008.pdf> )

*‘HSE believes strongly in the educational value of well-planned visits and is a firm supporter of outdoor education’*

(HSE website, 2017, <http://www.hse.gov.uk/services/education/> )

2.2 The aim of this policy is to ensure that the duty of care and the safeguarding of pupils from all SHINE Academies are fulfilled at all times, whilst undertaking such activities. This responsibility also extends to the members of staff and volunteers involved in supervising outdoor activities.

## 3. Legal framework

3.1 The Management of Health and Safety at Work Regulations 1999 made under the Health and Safety at Work etc Act 1974 require employers to:

- assess the risks of activities
- introduce measures to control those risks

---

<sup>1</sup>As at the date this policy was approved SHINE supports six academies (Ironville and Codnor Park Primary, Langold Dycarr Community School, John Hunt Academy, Ranskill Primary, Scotholme Primary and Nursery and Whitemoor Academy. Should additional schools transfer to SHINE before this policy is reviewed it will be adopted by them.

- inform their employees about the measures

3.2 In addition, employees must:

- take responsibility for their own and others' safety
- co-operate with their employers over safety matters
- carry out activities in accordance with training and instructions
- inform the employer of any serious risks

3.3 These responsibilities apply to **all** visits.

#### 4. Duty of care

4.1 Where a non-specialist or non-professional adult takes on responsibility for the supervision of young people, the legal expectation of the standard of care is described as that of a 'reasonable person'. Originally, the standard of care expected of school staff was described as being in loco parentis: in place of a prudent parent.

4.2 When the adult taking on the duty of care has a particular expertise or specialist knowledge, then the law may expect a higher standard of care – that of the 'reasonable professional'.

4.3 For an employer the standard is somewhat higher, as they are required to have safety management systems in place to ensure 'as far as is reasonably practicable' that people are not harmed by their activities. Those academies which undertake the care, supervision or control of vulnerable people (including children) have, in certain circumstances, a non-delegable duty of care and so are not merely required to 'take reasonable care' of those in their charge but to ensure **'that reasonable care is taken'**.

#### 5. Provision of OEAP national guidance

5.1 The national online guidance resource [Outdoor Education Advisers' Panel \(OEAP\) National Guidance](http://oeapng.info/) (Guidance for the Management of Off-site visits and Learning Outside the Classroom (LOtC) activities) is an invaluable reference document, that should be read alongside this policy. It is available from: <http://oeapng.info/>

5.2 If information in this policy is at variance to the advice in OEAP National Guidance (NG), the advice in this policy should be followed. If headteachers or visit leaders require further

information or advice they should contact the relevant Outdoor Adviser. Details can be found on the homepage of the relevant EVOLVE system.

5.3 It is a legal expectation that employees **must** work within their employer's guidance; therefore, employees must follow the requirements of "OEAP National Guidance", as well as the requirements of SHINE MAT's Health and Safety Policy and this Policy Statement.

5.4 Where a SHINE employee commissions Outdoor Learning or an Off-site visit activity, they must ensure that the supplier has either:

a) adopted SHINE or OEAP National Guidance

**or**

b) has systems and procedures in place to ensure that the standards are not less than those required by OEAP National Guidance.

## 6. Approval for visits

### 6.1 Categorisation of off-site visits/activities

6.1.1 Every off-site visit or outdoor activity must be either notified or approved by the headteacher before the event takes place.

6.1.2 For the purposes of approval, off-site visits are classified into three categories, see [Figure 1](#) for a summary:

**Category A** – Local and regular activities which are defined in this policy in terms of the nature of the activity and their location.

**All of these visits MUST be entered on EVOLVE. One application can cover a range of similar visits or a series of activities.**

For the purposes of this policy, the establishment defines **Category A** ('regular and routine' visits that take place in the 'local' area as part of a planned programme of activity over a given period of time) as follows:

1. Those activities that take place as part of a planned curriculum.

2. Such activities might include visits to: *Libraries, Swimming Pools and Leisure Centres, Local Schools, Sports Fixtures*; as well as activities on the delivery site of a non-adventurous nature, for example: *Forest Schools sessions*.
3. This also includes visits which can operate within the following locations: *the local neighbourhood or local built-up area, town or city*.

Beyond these areas of working, the visit becomes a **Category B** visit. Staff should be trained in the operation of this policy in relation to Category A visits.

**Category B** – Usually annual visits to attractions or locations beyond the ‘local’ area; for example, visits to the seaside, major visitor attractions, UK cities etc.

All of these visits MUST be entered on EVOLVE and will require the approval of the OVC and headteacher.

**Category C** – Includes: all **residential visits, visits abroad** and activities in **hazardous environments** or involving ‘adventurous’ activities, see [Figure 2](#) for more detail.

All of these visits MUST be approved using EVOLVE and will require the approval of the OVC and headteacher. The Trust central team must be advised of all Category C

## 6.2 Authorisation

6.2.1 The Chief Executive Officer (CEO) of SHINE delegates authorisation and approval for Category A and B visits to the headteacher. Category C visits will require the agreement of the CEO or delegated member of the Central Team.

## 6.3 Off-site visits co-ordinators

6.3.1 Each academy must nominate an off-site visits co-ordinator (OVC) who is responsible for coordinating all external events and visits and who has taken part in the OEAP 6-hour training course for OVCs. For further details of the role and responsibility of the OVC, please refer to [Outdoor Education Advisers’ Panel National Guidance on EVCs](#). (When reading OEAP Guidance, the term ‘Educational Visits Co-ordinator (EVC)’ is used synonymously with the SHINE term of ‘OVC’.)

6.3.2 The OVC should be carefully selected for the role by the headteacher and should have practical experience of leading and managing a range of visits similar to those typically run by the establishment. Normally, but not exclusively, such competence will be identified in a person within the senior management team of the establishment. A key role of the OVC is to

assess the competence of staff to lead visits. If the OVC does not have the professional background and competence for this task it will be the responsibility of the headteacher to fulfil this role.

## 7. EVOLVE

7.1 To assist in the planning, management, approval and evaluation of visits, SHINE employs the EVOLVE web-based management system. As well as being an efficient tool for planning and approving visits, EVOLVE also contains a variety of features including, search and report facilities, downloadable resources and information, staff records and visit history, gateway access for parents, etc.

7.2 EVOLVE must be used to plan and approve all visits.

## 8. Notification of visits

8.1 For **Category 'A'** this should be two weeks and for **Category 'B'** four weeks. However, it is recognised that some opportunities to work off-site may happen at short notice even in such cases academies must still use the EVOLVE system to approve them.

8.2 **Category 'C'** visits should be submitted (to SHINE) at least **six (6) weeks** prior to departure to allow for the form to be returned for clarifications or for arrangements to be amended. However, if the visit is Overseas, **twelve (12) weeks** should be given should be given.

## 9. Process of approval and notification

9.1 **Category A** Notification of Regular and Routine visits:

9.1.1 All local regular and routine visits both around and local to the site must be entered on EVOLVE as a means of notifying both the OVC and headteacher, see [Figure 1](#), who will authorise the visit.

9.1.2 Risk assessments uploaded to EVOLVE may include generic school risk assessments for



travel and all visits.

**9.2 Category B** visits to be approved by:

- **first stage approval: OVC**
- **second stage approval: headteacher**

9.2.1 For **Category B** visits, visit leaders should complete the following:

Complete the On-line application on EVOLVE Risk Assessments that should include:

- travel
- all visits
- any other risk assessment appropriate to the activity

Activity programme, Programme planning information, as appropriate.

OV2 (Provider checklist) or use LOtC Quality Badge for checking providers.

**9.3 Category C** Visits, to be approved by:

- **first stage approval: OVC**
- **second stage approval: Headteacher**
- **third stage approval: Relevant outdoor adviser – details can be found on the ‘home page’ of EVOLVE**
- **fourth stage approval: SHINE CEO**

9.3.1 For **Category C** visits, visit leaders should complete the following:

Complete the On-line application on EVOLVE risk assessments that should include:

- travel
- all visits **or** visits abroad, if going overseas
- accommodation – if staying overnight
- any other risk assessment appropriate to the activity programme or location

Activity programme. Programme planning information, as appropriate

Give minimum 6 weeks’ notice

OV2 (Provider checklist) or use LOtC Quality Badge

OV4 form – parental consent form completed

9.4 Approval is delegated to the headteacher for all visits (Category A and B), except for the following visit types:

- **overseas**
- **residential**
- those involving an **adventurous activity** and **hazardous environments** ref: [Figure 2](#)

9.4.1 The above three categories (Category C) are 'authorised' within the academy but are 'approved' by SHINE CEO or relevant delegated central team member in writing. These visits **must** be planned and submitted using EVOLVE.

9.4.2 Some examples of Category 'B' and 'C' visits are given in [Figure 1](#), with some further definitions of 'adventurous activities' given in [Figure 2](#).

9.4.3 In approving visits, the headteacher and OVC should ensure that the visit leader has been appropriately inducted/trained, and is competent to lead the visit, see **section 18**

9.4.5 A member of staff intending to supervise or instruct an adventurous activity, as defined in [Figure 2](#) must be specifically approved by SHINE to do so.

## **10. Roles and responsibilities**

**10.1 The headteacher, on behalf of SHINE MAT, must:**

- satisfy themselves that all appropriate risk assessments have been carried out, that appropriate safety measures are in place and that training needs have been addressed
- ensure that the visit has a specific and stated objective
- ensure that the visit leader shows how their plans comply with all relevant regulations and guidelines, including SHINE health and safety policy
- critically assess proposals for certain types of visits, which includes any visits which involve an overnight stay or travel outside the UK
- approve the visit form on EVOLVE once all the above requirements have been met

**10.2 Action in case of absence:** The approval of all visits on EVOLVE must be made by the headteacher or nominated deputy before departure. The task must not be delegated to

another member of staff unless the deputy headteacher has taken responsibility due to the headteacher being absent.

10.3 In certain circumstances, nominated SHINE personnel can be requested by the headteacher to process a visit in the absence of the OVC. E-mail permission should be sought from the headteacher prior to processing.

**10.4 The headteacher must ensure that:**

- the visit leader is competent to monitor the risks throughout the visit
- adequate child protection measures are in place
- all necessary paperwork and actions have been completed before the visit begins
- risk assessments have been completed and authorised and appropriate safety measures are in place. Category C visits must also be authorised by SHINE
- the training needs of staff and pupils have been assessed by a competent member of staff
- the visit leader has experience in supervising the age groups going on the visits and will manage the group effectively
- non-SHINE supervisors on the visit have passed the appropriate DBS checks
- the ratio of supervisors to pupils is appropriate
- where appropriate, parents have signed consent forms and given the necessary medical information
- adequate first aid arrangements are in place
- the mode of travel is appropriate
- travel times are known
- the address and phone number of the venue(s) are known
- an academy contact has been nominated and notified to the visit leader
- the visit leader and supervisors have copies of the agreed emergency procedures

- the visit leader has details of all the pupils travelling and the emergency contact details

10.4.1 For further details of roles and responsibilities please refer to [OEAP National](#)

[Guidance](#)

#### 10.5 The OVC will:

- ensure that the member of staff organising the visit has understood all issues relating to health and safety as outlined in this policy
- guide staff through the EVOLVE process ensuring that all procedures are adhered to
- ensure the competence of the staff and volunteers nominated to lead or supervise the visit
- ensure that all staff accompanying pupils are DBS checked
- ensure that parental consent is obtained, where appropriate
- ensure that emergency arrangements and contact numbers are in place for each visit
- keep records of individual visits including/accident/incident or near miss reports
- following a visit, review systems and monitor practice to ensure that they comply with SHINE policies and procedures and are fit for purpose

10.5.1 For further details on roles and responsibilities go to [OEAP National Guidance](#). A useful checklist can be found by following this link – [EVC checklist](#)

#### 10.6 The visit leader will:

- have overall responsibility for the supervision and conduct of the visit and for the health and safety of the group, including volunteers
- obtain the headteacher's formal approval on EVOLVE before any off-site visit takes place
- clearly define each additional teacher or group supervisor's role
- be able to control and lead pupils of the relevant age range

- be suitably competent to instruct pupils in an activity, or support a qualified externally provided instructor in carrying out this task and be familiar with the location where the activity will take place
- be aware of child protection issues
- ensure that appropriate first aid provision will be available
- undertake and complete the planning and preparation for the visit using the EVOLVE system including, where necessary, the briefing of parents
- undertake comprehensive risk assessments
- review progress regularly and advise the headteacher when adjustments need to be made
- ensure additional teachers and supervisors are fully aware of what the purpose of the visit is and what their roles are. For further guidance go to the following links – [Assistant Leaders](#) and [Helper](#)
- ensure the ratio of pupils to teachers is appropriate
- stop the visit if risks to the health and safety of the pupils are unacceptable and have in place procedures for this eventuality
- ensure that the group supervisors have details of the school contact
- ensure the additional teachers and supervisors have a copy of emergency procedures
- ensure that details of pupils' SEN and medical needs are known by all staff supervising the visit
- complete the post visit evaluation on EVOLVE

10.6.1 For further details on roles and responsibilities go to [OEAP National Guidance](#). A useful checklist can be found by following this link – [visit leader checklist](#)

## 10.7 Voluntary Help

- 10.7.1 SHINE recognises that many visits for younger children could not take place without the goodwill of voluntary helpers. Volunteers will normally be people well known to the individual academy as either parents or trustees/governors.
- 10.7.2 Volunteers will be told that they have the responsibility to follow all instructions issued by the visit leader who retains overall responsibility for the event.
- 10.7.3 The academy will appoint volunteer helpers as far in advance of the visit as practical and will provide opportunities for those volunteers to meet the pupils for whom they will be responsible before the visit. This is particularly important for younger pupils.
- 10.7.4 The academy retains the right to make the final decision on which volunteers will accompany the visit.
- 10.7.5 The visit leader will ensure that each volunteer knows precisely what their role is and understands that they have a responsibility to carry out that role.
- 10.7.6 Where children are organised in small groups, a child will not generally be placed in a group for which his/her parent is responsible.
- 10.7.7 All volunteers accompanying a residential visit will be required to obtain DBS clearance.

## **11. Ensuring understanding of basic requirements**

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

- appropriate guidance relating to off-site visits and outdoor learning activity
  - 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.
- a) The **appropriate guidance** for the management of outdoor learning and off-site visits in SHINE is this Policy document and the OEAP National Guidance website.

- b) The **relevant training courses** in support of delivering this policy in SHINE are:
- **OVC training** - all SHINE academies are required to have a current OVC in post who has undertaken the 6-hour OEAP EVC training course or equivalent.
  - **OVC revalidation** - all SHINE academies are required to ensure that their OVC undertakes a formal revalidation from time to time, the recommended period being every 3 years.
- c) Where an employee experiences problems with finding the material, they are looking for, or requires clarification or further help and guidance, they should contact their establishment's OVC, or the outdoor education adviser nominated by their employer.

11.2 The nominated outdoor adviser **can be found on the homepage of the relevant EVOLVE system.**

## **12. Planning the visit**

12.1 The processes and procedures to be followed when organising a visit are embedded in the EVOLVE system. An initial dialogue should take place with the OVC at the appropriate academy site.

12.2 Whatever the destination, it is of critical importance that formal planning is undertaken to consider the potential dangers and difficulties associated with the visit and that appropriate plans are in place to reduce the risks.

12.3 For further guidance on planning refer to:

[visit leader checklist](#)

[Basic Planning document](#)

## **13. Parent / carer consent**

13.1 Both DfE and OEAP (Outdoor Education Advisers' Panel) National Guidance tell us that:

*Schools are not required to obtain consent from parent/carers for pupils to participate in off-site activities that take place during school hours and which are a normal part of a child's education, such as local studies and visits to a library etc. (Education Act 2002*

section 29)

For further information refer to OEAP Guidance on [Parental Consent](#)

13.2 Parents/carers should be informed of such activities. This can be done through the academy website, prospectus, policy, e-mail or a letter home.

13.3 However, **consent is required** for visits outside normal school hours and for adventure activities. This should be supplemented by more detailed information regarding the visit or activity so that parents/carers can give 'informed consent' for their child to participate.

13.4 Consent for such activities can be obtained via a 'blanket consent form', which could be sent home at the start of each year. However, it may also make sense for a further 'consent' form to be sent out to cover residential, visits abroad and adventurous activities as well, as these are slightly higher risk activities. This would be more specific to the event.

13.5 As a result, three forms have been designed for schools to use and adapt:

13.6 **OV4 – General consent form**, to act as an annual/blanket consent form

13.6.1 This can be used for gaining consent from parents and carers for taking pupils on visits and activities that go beyond the 'normal' school day. This will also cover consent for adventurous activities that take place on and away from the academy site.

13.6.2 This could be completed annually or at the start of each term.

13.6.3 It would still be a requirement of schools to inform parents, nearer the time, about such visits and activities, giving greater detail of the visit/activity. The OV3 Form highlights the information that might be covered in any communication to parents about a visit. If these visits go beyond the school day then parents and carers have a right to withdraw their children from the activity or visit.

13.7 **OV4 - Specific**, to act as a specific consent form for a particular activity/visit.

13.7.1 This form can be used as both a consent form for a 'specific' activity or visit and also enables schools to update personal details of the child and emergency contacts.

13.8 **OV3 Form** - To inform parents of a visit. This could be used for visits that do not require consent as well as those that do. This covers the type of information that might be required and can be adapted by schools to fit individual requirements and formats.

13.8.1 All forms are available from the **resources** section of EVOLVE

13.9 **Taking copies of consent forms on visits**



13.9.1 There is no requirement for visit leaders to carry evidence of consent on visits in the UK, although it is recommended for day visits, residentials and adventurous activities.

13.9.2 Parental Consent forms **must be taken on any visit abroad**.

## 14. Risk Assessments

14.1 Risk assessments must be undertaken and completed in person by the visit leader.

14.2 Pupils and staff must not be placed in situations which expose them to an unacceptable level of risk. Safety must always be the prime consideration. If the risks cannot be contained, then the visit must not take place.

14.3 The risk assessment should be based on the following considerations, which are based on the HSE [Five Steps to Risk Assessment](#):

- what are the hazards?
- who might be affected by them?
- what safety measures need to be in place to reduce the risk to an acceptable level?
- can the visit leader put the safety measures into place?
- what steps will be taken in an emergency?

14.4 The person who conducts the risk assessment must record it and give copies or hold a briefing for all teachers/supervisors on the visit with details of the measures they should take to reduce the risk.

14.5 For all pupils with an Education, Health and Care Plan (EHCP), an individual risk assessment for off-site visits, updated each full term, should be recorded in their personal file. Visit leaders must ensure that the individual risk assessments for pupils with an EHCP have been updated to take account of the planned activities during the proposed visit and that all leaders hold a copy for each pupil in their group.

14.6 Frequent visits to local venues such as swimming pools do not have to be assessed each time; however, a generic risk assessment must be completed each term or annually as appropriate.

- 14.7 A wide range of generic risk assessments are available in the **resources** section of EVOLVE. These risk assessments are reviewed every year and, if necessary, during the year. It is **recommended that staff always download these risk assessments** when planning a visit in order that the most up-to-date information is used.
- 14.8 For every visit an **all visits** and relevant **transport** risk assessment should be undertaken as a **minimum**. For residential visits, an **accommodation** risk assessment should also be undertaken. For visits abroad, please complete the **overseas** visits risk assessment instead of all visits risk assessment. Risk assessments will also need to be completed for additional activities that academy staff are leading. When a third party is leading activities, there is no need to complete risk assessments for the activities they are leading.
- 14.9 The visit leader should monitor the risks throughout the visit and take appropriate action when necessary.
- 14.10 Further guidance on risk management and visits can be found at the following locations:
- [Risk Management – An overview](#)
- [Risk Management – Some practical advice](#)

## 15. Charges for off-site activities and visits

15.1 Academy headteachers, OVCs and visit 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<sup>2</sup>.

15.2 Refer to OEAP National Guidance document: [Charges for Off-site Activity](#)

## 16. Vetting and DBS checks

16.1 **SHINE** 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

---

<sup>2</sup> <https://www.legislation.gov.uk/ukpga/1996/56/contents>

recruitment process.

16.2 For the purposes of this guidance:

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

16.3 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.

16.4 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.

16.5 Refer to OEAP National Guidance document: ["Vetting and DBS Checks"](#)

## **17. Initial visit**

17.1 For a venue which has not been used before, the visit leader is strongly advised to carry out a preparatory visit to:

- ensure that the venue is suitable to meet the aims and objectives of the educational experience
- assess potential areas and levels of risk
- become familiar with the area before accompanying young people
- assess the category of visit

17.2 Even if a venue has been used before a pre-visit may still be required.

## **18. Using external providers and facilities**

18.1 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 young people. It is a vital dimension of risk management and an essential part of fulfilling your 'Duty of Care'.

18.2 Wherever reasonably practicable, it is strongly recommended that a preliminary visit is undertaken.

### 18.3 Using an external provider

18.3.1 An 'external provider' normally provides one or more elements on an activity or visit such as instruction, staffing, guiding, or accommodation. This may be, for example:

- an Activity Centre
- a Ski Company
- an Educational Tour Operator
- an Overseas Expedition Provider
- a Climbing Wall where instruction is provided by climbing wall staff
- a Freelance Instructor of adventurous activities
- a Youth Hostel (where instruction is provided)
- a Farm
- a Voluntary Organisation (e.g. Scout Association), where instruction is provided

18.3.2 For the purposes of SHINE approval, an external provider is **NOT**:

- a Campsite
- Museums, galleries, etc
- Tourist attractions
- Theme Park
- a Coach, Train, or Airline company
- a Local Authority Swimming Pool staffed by nationally recognised lifeguards
- a Climbing Wall where instruction is provided by a member of your establishment's staff with an approved Leader Approval Form (LAR) / Activity Leader Form (ALF) (**Section 38** applies)

### 18.4 Residential providers

18.4.1 You must make reasonable checks to ensure that the accommodation is suitable for your group. There should be appropriate security arrangements to prevent unauthorised persons entering the accommodation, separate male and female accommodation and washing facilities with staff accommodation close to participants' accommodation. In the UK, accommodation should be: covered by a current fire certificate and / or advice has been sought from a fire officer and implemented; and a fire risk assessment has been completed. If abroad, the accommodation complies with fire, health and safety regulations which apply in the country concerned.

18.4.2 Refer to **Generic Risk Assessment: Accommodation**, found in the resources section on EVOLVE.

18.4.3 Some residential providers may hold a LOtC Quality Badge. If not, it may be helpful to use the OV2 Form to gather this information (and retain evidence). Alternatively, you could carry out a pre-visit and take a checklist. Indicate on your EVOLVE application how you have checked out the accommodation.

## 18.5 All Providers

18.5.1 The decision about the use of an external provider is the responsibility of the visit leader, OVC, and headteacher. SHINE does not 'approve' external providers or tour operators.

Establishments may find it useful to 'Search by External Provider' on EVOLVE and liaise with other SHINE Academies or schools in the local area that have used a particular provider.

Further steps may include:

- asking for written references from other groups if the provider is not known locally, and contacting the referees directly
- inviting presentations and quotations from providers offering a similar service to ensure that you are getting good value for money
- visiting a course being run for another group to observe standards and talk "informally" to staff from that group

18.5.2 To confirm that all aspects of the operation of the provider are satisfactory, the establishment must ensure that either:

- a) The Provider holds an LOfC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk) **or**
- b) An 'OV2 Form' has been satisfactorily completed by the provider.

18.5.3 Note: If a provider holds an [AALA licence](#) (and/or any other accreditation) but not an LOfC quality badge, then a provider form is still required.

## 18.6 For providers that hold an LOfC Quality Badge

18.6.1 Check that the provider's Quality Badge will be valid on the date of your visit ([click here](#)).

18.6.2 SHINE academies must ensure the provider has at least £5 million public liability (academy staff should check their employer requirements). No further action is necessary, other than to check the suitability of the provider/venue in relation to the intended aims or learning outcomes for the particular group. A pre-visit and recommendation from previous users will help you decide on its suitability. See [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

## 18.7 For Providers that **do not** hold an LOfC Quality Badge

- download an OV2 Form from EVOLVE
- complete the top section
- send OV2 Form to the provider (email, fax, post)
  
- on its return, check that it has been satisfactorily completed
- keep OV2 Form on file together with all other relevant documentation - Attach a copy of the Provider Form to EVOLVE

18.7.1 **Important:** The Provider Form (**OV2**) should be sent to the provider at the time of making a provisional booking and no deposits should be committed prior to its satisfactory completion and return.

18.7.2 If the provider has made any alterations to the wording of the Provider Form or is unable to comply, then you must discuss this with the provider, and if necessary, seek advice from the outdoor adviser prior to making a commitment with the Provider.

18.7.3 The satisfactory completion of an OV2 Form does not necessarily signify that the service

on offer will be appropriate for the young people from your establishment. A pre-visit and recommendation from previous users will help you decide on its suitability.

18.7.4 The above procedure is **not** sufficient for Overseas Expeditions (ie. those which typically take place in remote areas of the world and/or in developing countries), for which separate arrangements are applicable and **must** be complied with, the SHINE '**Guidance on Visits, Planning and Adventure Activities**' found in the **resources section of EVOLVE**.

18.7.5 For further guidance on external providers refer to [OEAP NG guidance](#).

## **19. Adventure Activities and Licensing Regulations**

19.1 Headteachers, OVCs and visit leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated. On outline of what constitutes an **Adventurous Activity** is given in [Figure 2](#).

19.2 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 DfE. The scheme is now the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

19.3 SHINE employees should be aware that the AALA licence is an assurance of safety. It does not accredit educational or activity quality.

19.4 Refer to OEAP National Guidance document: [AALA Licensing](#)

19.5 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.

19.6 Examples of such schemes include:

- The LOtC Quality Badge
- Adventuremark

19.7 **SHINE takes the view that where a provider holds one of the above accreditations, there should be no need to seek further assurances, if not academies should use the OV2 form as part of the checking process.**

- Adventure Activities Licensing Scheme – where a provider is delivering activities covered by the scheme they **MUST** hold a license.

19.8 For further guidance refer to [Using external providers and facilities](#) and the National Guidance document [Adventure Activities](#)

## **20. First aid**

20.1 For guidance on first aid refer to SHINE guidance on first aid provision within the health and safety policy.

20.2 Academies should already have in place a risk assessment which determines their first aid provision on site. Off-site provision should simply be an extension of this.

20.3 The determination of the appropriate requirements should take into account:

- the nature of the activity
- the nature of the group e.g. any underlying medical issues with pupils or staff, staff pupils ratio etc
- the likely injuries associated with the activity
- the extent to which the group will be isolated from the support of the emergency services (both in terms of distance, response time, reliability of mobile phone signal)

20.4 Qualified first aiders may not be necessary for all off-site activities and visits, such as some category A visits, and if this is the case a specific risk assessment **must** be undertaken and attached to the EVOLVE form for that visit. However, a basic level of first aid support must be available at all times, this could be someone who previously held a first aid qualification; someone who is confident and competent to give basic first aid due to experience, or access to nearby first aid support or external first aiders including the emergency services. If suitably qualified first aiders are attending a visit a specific risk assessment will not be necessary and the assessment will be part of the overall generic risk assessment for the visit.



## **21. Competence to lead**

21.1 To be deemed competent, a SHINE visit leader, or assistant leader must be able to demonstrate *the ability to operate to the current standards of recognised good practice for that role.*

21.2 All staff and helpers must be competent to carry out their defined roles and responsibilities. OEAP National Guidance sets a clear standard to which SHINE leaders must work. The guidance states:

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

- knowledge and understanding of their employer’s guidance supported by establishment led training. It is good practice for employers to provide formal and accredited training to support their guidance e.g. OVC training, visit leader training. 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*
- appropriate experience in some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification”*

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

21.4 Where a volunteer helper is a parent (or otherwise in a close relationship with a young person taking part in the visit) they should be made aware of the potential for their

relationship to compromise the visit leader's plans for group management. The visit leader should directly address this issue as part of the risk-benefit assessment.

21.5 Refer to OEAP National Guidance document: [\*"Good Practice Basics"\*](#)

#### **21.6 Assessment of competence**

21.6.1 OEAP National Guidance provides clear advice regarding the assessment of leader competence.

21.6.2 The OVC and/or headteacher must consider the following when assessing the competence of a member of staff to lead a visit:

- a) what experience has the leader in leading or accompanying similar or other visits?  
(check visit history on EVOLVE)
- b) is the leader competent in planning and managing visits (have they completed visit leader training?)
- c) what are the leader's reasons for undertaking the visit?
- d) is the leader an employee of the academy?
- e) does the leader have the ability to manage the pastoral welfare of participants?
- f) does the leader exhibit sound decision-making abilities?
- g) what experience has the leader of the participants he/she intends to supervise?
- h) what experience has the leader of the environment and geographical area chosen?
- i) does the leader possess appropriate qualifications?
- j) if appropriate, what is the leader's personal level of skill in the activity and fitness level?
- k) if leading adventurous activities, has the leader been 'approved' by SHINE MAT?
- l) is the leader aware of all relevant guidelines and able to act on these?

21.6.3 Refer to OEAP National Guidance document: [\*Assessment of Activity and visit leader Competence\*](#) and [\*Assessment of Competence\*](#)

## **22. Requirement to ensure effective supervision**

22.1 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”. However, as an exception to the above, Ofsted and DfE guidance prescribe ratios for Early Years, see [Statutory Framework for the Early Years Foundation Stage](#)

22.2 Effective supervision should be determined by proper consideration of:

- age (including the developmental age) of the group
- gender issues, such as mix of accompanying staff
- 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

22.3 A visit must not go ahead where either the visit leader, OVC, or headteacher is not satisfied that an appropriate level of supervision exists.

22.4 Staff who are assigned to support the special needs of an individual cannot be included in the overall staffing ratio. Their responsibility should not include the wider group.

22.5 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.

#### **22.6 Children of group leaders and other supervising staff**

22.6.1 There are a number of issues of concern if staff propose to take their own children on a visit, for example:

- the child may not be insured
- staff may be distracted by dealing with their own children, particularly if they are tired or unwell and this may compromise their ability to carry out their responsibilities for the rest of the group effectively
- there may be additional costs incurred, which should be met by the staff member
- Is the child physically able and of a similar age to the group if taking part in activities?

22.6.2 Headteachers and OVCs should review the risk assessment to consider whether the presence of a supervisor's child will require these assessments to be modified. **Staff taking their own children on a visit should not be included in the calculation of the overall staff ratio i.e. there must be sufficient appropriately qualified and experienced staff to safely manage the group without them if necessary.**

22.6.3 **The headteachers must specifically check if insurance cover is in place for the child/children concerned.**

22.6.4 Refer to **OEAP National Guidance** documents: [Group Management and Supervision](#) , [Ratios and Effective Supervision](#) , [Vetting and CRB Checks](#)

22.6.5 Whatever the length and nature of the visit, staff must check pupils regularly. All staff must carry lists of pupils at all times. Pupils, particularly in years 1-3, must be identifiable and known to the person supervising them.

## **23. Pupils with medical needs**

23.1 Additional safety measures will need to be taken during the visit for pupils with pre-existing medical conditions. Arrangements for taking medication and ensuring sufficient supplies for residential visits may be required.

23.2 All staff must be fully aware of pupil's and staff medical needs and any procedures to be followed in the event of a medical emergency. Summary sheets must be held by all staff containing details of each pupil's needs.

23.3 If a pupil's safety cannot be guaranteed an individual risk assessment should be completed and the pupil may need to be withdrawn from the visit.

23.4 The headteacher's decision is final in this matter.

23.5 Parental information on the following must be obtained:

- current medical conditions
- emergency contact details
- GP's name, address and phone number
- written details of any medication required
- parental permission for pupil self-administration or agreement for staff member to administer

- information on allergies or phobias
- special dietary requirements
- toileting difficulties

23.6 If the staff member is concerned about whether they can provide for a pupil's safety, or the safety of other pupils on the visit, they must discuss this with the headteacher. The headteacher or a delegated representative will discuss this with parents and the school health service or the pupil's GP.

23.7 Additional guidance on 'Insurance cover and medical condition, can **be found in the resources section of EVOLVE, in the Policies and Guidance Document folder.**

## 24. Inclusion

24.1 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 young people with special needs, every *reasonable* effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

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

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

24.3 Headteachers, OVCs and visit leaders should be aware of the extent to which Inclusion is or is not a legal issue.

24.4 Under the Equality Act 2010<sup>3</sup>, it is unlawful to:

---

<sup>3</sup> <https://www.gov.uk/guidance/equality-act-2010-guidance>

- treat a disabled young person less favourably
- fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage

24.5 Refer to OEAP National Guidance document: [Special educational needs and disability](#)

## **25. Travel and transport**

25.1 Parents should be informed as to the mode of transport being provided for an educational visit.

## **26. Travel by coach, minibus and private car**

26.1 Seat belts must be provided and it is SHINE policy that these must be worn whilst travelling on a school visit. Staff must check before the vehicle is in motion and during the journey that belts are fastened and remind pupils that these must be worn throughout the journey.

26.2 See generic risk assessments for travel by coach, minibus and private car found in the **resources** section of EVOLVE.

## **27. On foot**

27.1 Pupils should walk in controlled groups. One member of staff should be at the front in control of the group, another at the back or aware of any individuals who are lagging behind. The degree of control will depend upon the nature of the group (age, ability) and the location.

27.2 For further information please see the SHINE generic risk assessment on travelling by foot or walking found in the resources section of EVOLVE.

## **28. Briefing for pupils prior to the visit**

28.1 It is good practice to involve pupils in the preparation and planning of any visit and take an active part in the risk management process.

28.2 As part of their preparation for the visit, pupils should be made aware of the educational

benefits of the visit and the risks involved.

28.3 Prior to the visit, the pupils will be made aware of the standards expected of them (Code of Conduct), this will be appropriate for the age group attending the visit.

28.4 The visit leader should make it clear to pupils that they must:

- not take unnecessary risks
- follow all instructions given by any staff or supervisor
- be sensitive to people in the local environment
- watch for anything which might hurt or threaten themselves or anyone else in the group and advise the visit leader or teacher.

28.5 Any pupils whose behaviour may be considered to be a danger to themselves, or the group may be withdrawn from the visit. The curricular aims of the visit for these pupils should be fulfilled in other ways where possible. The headteacher's decision will be final in this matter.

## **29. Medication**

29.1 Refer to the SHINE policy on the administration of medicines

29.2 For further advice please refer to OEAP National Guidance: [Medication](#)

## **30. Accidents and Incidents**

30.1 All accidents and incidents taking place during school visits and journeys must be reported and recorded in accordance with the academy Health and Safety Policy. Accidents and incidents will be reviewed to identify learning points which will be shared, as appropriate, with others.

## **31. Emergency Procedures**

31.1 Emergency procedures are an essential part of planning a visit or an offsite activity. If an accident occurs the priorities are to:

- assess the situation
- safeguard the remaining members of the party
- attend to the casualty(ies)
- inform the emergency services
- inform the senior leadership team (SLT) contact

31.2 The academy's critical incident and continuity management plan gives further advice on dealing with accidents and emergencies.

**31.3 For minor injuries, the visit leader/supervisor should:**

- arrange for the visit first aider/s to give appropriate assistance
- phone the headteacher or SLT member so they can inform the parent/carer of the injury
- fill in an accident form on return to the academy

**31.4 For injuries which could have serious implications the visit leader/supervisor should:**

- arrange for the visit first aider/s to give appropriate assistance
- call for an ambulance
- if an ambulance is called and you need to go to hospital with the injured pupil try to find out which hospital so that you can inform the SLT contact who will in turn inform the parent/carer (do not call the parent/carer yourself)
- phone the SLT contact – mobile numbers will be given to the visit leader
- arrange for a member of staff to remain at the hospital with the pupil until an SLT member arrives
- the visit leader must write a full written account of events ASAP with photographs of the scene etc. if safe and possible to do so

31.5 Complete an accident report form on return to the academy

**31.6 The headteacher/SLT member will take responsibility for:**

- phoning the parent/carer – the visit leader/supervisor should not make this call
- going to the hospital to be with the injured pupil and taking over the responsibility from the visit leader/supervisor. It is the responsibility of the member of staff to remain with the pupil at the hospital until the headteacher/SLT member arrives
- this information will help if there is an investigation and/or insurance claim



### 32. Categories of activity and approval

CATEGORY	LEVEL OF APPROVAL	ACTIVITY	ENVIRONMENT / LOCATION
<b>A</b>	<b>OVC</b>	<ul style="list-style-type: none"> <li>- Sports fixtures, within the city/county</li> <li>- School Swimming – formal teaching in life-guarded pools</li> <li>- Regular visits to libraries, places of worship, local parks and open spaces, local shops etc</li> <li>- Fieldwork in environments with no technical hazards (nature reserves, woods and parkland)</li> </ul>	<ul style="list-style-type: none"> <li>- Local parks, residential areas and shopping areas</li> </ul>
<b>B</b>	<b>OVC and Headteacher</b>	<ul style="list-style-type: none"> <li>- Full Day visits to museums, attractions and parks some distance from the academy (theatre, cinema, farm visits etc)</li> <li>- Theme Parks and other tourist attractions</li> <li>- Seaside resorts</li> <li>- Zoos</li> <li>- Ice skating</li> <li>- Swimming in public, lifeguarded, pools</li> </ul>	<ul style="list-style-type: none"> <li>- Walks in ‘<b>non-remote</b>’ country</li> <li>- <b>Non-remote Country</b> – enclosed farmland, fields, lo land forest – not moorland, mountain (above 600 and/or where it is possible to be more than 30 mins 2.5km from a road or refuge</li> <li>- ‘Water Margin’ activity</li> </ul>

C	<b>OVC and Headteacher</b>  <b>(SHINE Written Agreement)</b>	<ul style="list-style-type: none"> <li>- Any visits/activity involving a Residential (overnight stay elements including camping and school sleep overs)</li> <li>- Any visit abroad</li> <li>- Any visit involving ‘adventurous activities’ led by either a centre, outdoor provider or staff member</li> </ul>	<ul style="list-style-type: none"> <li>- Visits to hazardous environments</li> <li>- Overseas expeditions</li> <li>- Any water-based activity</li> <li>- Any activity in winter mountain conditions</li> <li>- Near cliffs of steep terrain</li> <li>- Areas subject to extremes of weather</li> <li>- Swimming in open water</li> </ul>
---	--	---	--

**33. Figure 2 Definition of adventurous activities – all require shine approval on EVOLVE Adventurous Activities covered by AALA Licensing**

Rock Climbing Abseiling Ice Climbing Gorge Walking Ghyll Scrambling Sea Level Traversing	Canoeing Kayaking Dragon Boating Wave Skiing White-water Rafting Improvised Rafting Sailing Sailboarding Kite surfing Use of powered craft boats Windsurfing	Hillwalking – in ‘open country’ Mountaineering Fell Running Pony Trekking Off Road Cycling Off-piste Skiing	Pot-holing Mine Exploration Caving
---	--	--	--

**Adventurous Activities NOT covered by AALA Licensing**

Quad biking Go-Karts Horse Riding	Archery Rifle Shooting Fencing	Orienteering in 'remote terrain' Expeditions in 'remote terrain' Fieldwork in 'remote terrain and in water.	Climbing Walls High Ropes Courses Dry Slope Skiing Grass Skiing Water Skiing Snorkelling Scuba Diving
---	--------------------------------------	--	---

These are not exhaustive lists. If you are in doubt about the level of activity you are undertaking, contact the relevant Outdoor Education Adviser.

**If you need help in understanding it in your own language, please contact the SHINE Team on 0115 9786351.**

Jeśli potrzebujesz tej informacji w alternatywnej wersji, takich jak duży druk, Braille'a, taśmy lub pomoc w zrozumieniu go w swoim języku, skontaktuj się z zespołem polysk na 0115 9786351.

Jei jums reikia šią informaciją alternatyvi versija pvz stambiu šriftu, Brailio raštu, juostos ar padėti suprasti savo gimtąja kalba, prašome susisiekti su valymo komanda 0115 9786351.

यदि आप एक वैकल्पिक संस्करण में इस जानकारी की आवश्यकता है जैसे बड़े िरंट, ब्रेल, टेप या इसे अपनी खुद की भाषा में समझने में मदद , कृ पया 0115 9786351पर शाइन टीम से संपकक करें .

Dacă aveți nevoie de această informație într-o versiune alternativă, cum ar fi imprimare mari, Braille, bandă sau ajutor în înțelegerea-l în limba dumneavoastră, vă rugăm să contactați echipa de pantofi pe 0115 9786351.

اگ رآپ اس معلومات م ی ای ک متبادل ورژن ج ے ی س بڑ ے حروف م ی چھپ ا ، یریل، ٹی پ ی ا ا  
س ک واپ ن زبان م ی سمجھن

م ی مددی ک صورت ہ و ی ، پے 9786351 ال ی پرشائن ٹیم ے س

رابطہ کریں -