

Juniper

Educational Visits Policy

Establishment type	Primary School and Nursery
Name of establishment	Chase Lane Primary School and Nursery
Who is employer	Essex County Council
Responsibility for offsite visits (possibly Head, EVC, or deputy head)	EVC
Date Trained	December 2022
Policy agreed	February 2025
Signed off by	
To be reviewed	January 2028
Other Policies Related	Child Protection. finance, Juniper Essex Guidance for Educational Visits 2024/25, School Minibus Policy, Private Car Transport Policy
Other Paperwork Attached (appendix)	Booking form, Visit Leader Checklist, Parental consent forms, School Emergency Plan, Private Car Transport Policy, School minibus Policy, Post visit Review Signing-out sheet for ad-hoc activities in the school locality- Generic and Site/Person specific risk assessment for local area visits

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1 Introduction

The Governing Body has the responsibility of providing guidance for off-site school visits and it is essential that any staff member of Chase Lane Primary School and Nursery reads this policy before contemplating or organising any educational trip or visit to be made by children from this school.

- **Read the OEAP National Guidance** - Guidance for the Management of Outdoor learning, Off-site visits and Learning Outside the Classroom. (Essential reading documents specific for your role e.g. Governor / Head / EVC / Visit Leader / etc.) See website link : www.oeapng.info/
- The DfE guidance : Health & Safety on Educational Visits (Nov 2018) The 8 key points addressed in this document have been embedded in this policy
- Guidance for Educational Visits 2024/25
- **NB: FAILURE TO FOLLOW THESE REGULATIONS MAY LEAD TO CONSEQUENCES FOR INSURANCE COVER AND LEGAL LIABILITY.**

2 Reasons for Visits

All schools are required to offer children a broad and balanced curriculum that promotes spiritual, moral, cultural, mental and physical development.

All activities must have a clearly defined educational purpose and we seek to ensure that the National Curriculum is delivered to all children, regardless of social background, race, gender or differences in ability. All are entitled to the development of knowledge, understanding, skills and attitudes.

To enrich the curriculum at Chase Lane Primary, we offer a range of educational visits that add to their learning at school.

3 Visits and curriculum links

All educational visits and activities support and enrich the work we do in school. There are also a number of people who visit the school to support our work. Some visits relate directly to areas of learning for individual classes, whilst others relate to all our children.

For each subject in the curriculum there is a corresponding programme of activities, which includes visits by specialists. All these activities are in line with guidance published by the LEA: e.g.

- English - theatre visits, visits by authors, poets and theatre groups
- Science - use of the school grounds, visits to local woods and beach
- Mathematics - use of shape and number in the local environment
- History- castle visits, study of local housing patterns, museums
- Geography - use of the locality for fieldwork, field work further away
- Art and design - art gallery visits, use of the locality
- PE - range of sporting fixtures, extra-curricular activities
- Music - range of specialist music teaching, extra-curricular activities, concerts for parents and children to hear

- Design and technology - work with local secondary school
- ICT - its use in local shops/libraries/secondary schools etc.
- RE - visits to centres of worship, visits by local clergy.

NOTE - when extra-curricular activities take place there should always be an adult, other than the one running the activity on the premises.

- **Gaining approval for a trip**

Governors

As part of their responsibility for the general conduct for the school, the Governing Body has adopted this policy for the effective and safe management of educational visits.

The Governors must approve any visit involving an overnight stay or Overseas Visit. The Governors delegate the Headteacher the responsibility to approve all other visits including Local Area Visits.

The Governors have adopted a charging and remissions policy:

The Headteacher

DfE guidance: Health & Safety on Educational Visits (Nov 2018 Section 8)

Guidance for Educational Visits 2024/25

- o is responsible for ensuring that all school activities are properly planned and appropriately supervised and that this policy is implemented.
- o should ensure that the aims of the visit are commensurate with the needs of the pupils, including those with special educational needs for whom additional, appropriate arrangements may need to be made. For additional guidance refer to the Equality Act 2010
- o should ensure the suitability of all staff appointed to the visit.
- o should ensure that the visit leader fully understands his/her responsibilities.
- o should implement effective emergency contact arrangements.
- o should ensure that financial and insurance matters, staff ratios and parental consent are dealt with appropriately.
- o should have a system in place to record, audit and monitor school off-site visits.

An electronic submission process **EVOLVE** is used to log, audit, approve the following:

Overseas	formal approval by	EVC and Head and LA
Residential	formal approval by	EVC and Head and LA
Adventurous	formal approval by	EVC and Head
Day Visits with transport	formal approval by	EVC / Head
Local Area Visit	formal approval by	EVC / Head

5 Choosing a provider

After considering the reasons for the visit, the visit leader should check out the provider. See Section

www.oeapng.info/ 4.4f 4.4g and 4.4h- Note the need to check on insurance/ Ts & Cs/ LOTCQB etc.

DfE guidance : Health & Safety on Educational Visits (Nov 2018 Section 3)

If the trip requires a coach a booking form needs to be completed and handed to the office at this stage (Appendix 1)

6 Parental Consent :

OEAP National Guidance Document

www.oeapng.info 4.3d-Parental-Consent

DfE guidance : Health & Safety on Educational Visits (Nov 2018 Section 2)

Guidance for Educational Visits 2024/25

When to get consent from parents:

Parental consent to off-site activities: Written consent from parents is not required for pupils to take part in the majority of offsite activities organised by a school (with the exception of nursery age children) as most of these activities take place during school hours and are a normal part of a child's education at school. However, parents should be told where their child will be at all times and of any extra safety measures required.

7 Visits and staffing

Complete Visit leader checklist - (Appendix 2)

www.oeapng.info 3.3e-Visit-Leader-Check-List and 3.4k Visit or Activity Leader

The visit leader must recognise that whilst leading the visit, he or she is in effect representing the Headteacher and holds delegated responsibility for Health & Safety and Duty of Care.

It is the responsibility of the Visit Leader to carry out Risk Assessment / Risk management for the visit. For Risk Assessment guidance see www.oeapng.info 4.3g Risk Management

Key Requirements for Leaders

The key requirements for leaders are that they must be competent to lead, confident and accountable. Being competent means that the leader has demonstrated the ability to lead to the level demanded by the visit or activities that they are to lead, and has sufficient relevant experience and knowledge of the activities, the group, and the environments they will operate in. Competence is a combination of skills, knowledge, awareness, judgement, training and experience. It is not necessarily related to age or position within the establishment.

Visit Leader Training

Should be offered to all leader staff and can be delivered by the trained EVC or by the Educational Visits Adviser. A Juniper Education online learning module is available for schools allowing cost effective CPD opportunity for all their staff engaged in anyway on out of school activity. (See EVOLVE Homepage for more details) This is strongly recommended to ensure all staff are clear on their roles and responsibilities when engaged in off-site activity.

For all visits there should be a responsible adult with a good working knowledge of first aid appropriate to the environment. Based on the nature of the visit, the EVC (or visit leader) should make a professional judgement regarding the level of first aid training required. A first aid kit appropriate to the visit should be carried. For EYFS outings, there must always be at least one member of staff present who holds a Paediatric First Aid certificate.

8 The visit

On the day

Leave in the school office:

- an amended list of children attending and going on visit.
- full list of escorts and staff and groups of children for which they are responsible
- the itinerary for the entire day.
- a copy of the written briefing notes for the escorts.
- check children out of classroom to ensure bags, lunchboxes and clipboards are taken
- take First Aid Kit, sick bucket, inhalers and other medication e.g. epipen and mobile phone.
- Copies of Emergency/ Critical Incident cards given to all leaders.

Staffing Ratios

Staffing ratios Activity and Visit Leaders must ensure that young people are supervised in accordance with the principles of "Effective Supervision", requiring them to take account of:

- The nature of the activity (including its duration)
- The location and environment in which the activity is to take place
- The age and gender (including developmental age) of the young people to be supervised?
- The ability of the young people (including their behavioural, medical, emotional and educational needs)
- Staff competence.

Ratios are a risk management issue, and should be determined through the process of risk assessment. It is not possible to set down definitive staff/student ratios for a particular age group or activity. Some guidance documents do set out ratios, but these should be regarded as starting points for consideration rather than being definitive, as they may be appropriate only where the activity is relatively straightforward and the group has no special requirements. For example, the DfE publication HASPEV (1998) suggested the following "starting points": School years 1 - 3, 1:6 years 4 - 6, 1:10/15 Without special safeguards or control measures, these ratios will not be adequate to meet the needs of most residential or more complex visits.

During the visit

Young Children must be kept in escort's group at all times.

There should be a system in place to safeguard young people at all times. (e.g. If toileting issues arise, an approach could be not to send young children into the toilets on their own but in small groups.

Courtesy to the public must be shown at all times, care taken not to block pathways, etc.

Escorts should ensure the safety and well-being of the pupils in their care and inform the visit leader or another member of staff of any relevant incident involving pupils in their care as soon as possible.

Every escort must be given an emergency procedures card. This will have the school's contact and action plan in case of an emergency.

On return

Check all children off the coach and a member of staff must lead the class either into school or to area of playground where children can be collected by parent and teacher can check them off, thus ensuring that each child departs with known parent or neighbour.

A teacher must remain with uncollected children until all parents have arrived and all children have departed.

9Financing the visit

When stating the cost for each individual:

- explain where this cost has come from and that the school would like a voluntary donation from parents to fund the visit.
- Stipulate the School's policy concerning parents who are unable to offer a voluntary contribution - which is that, no child will miss a trip if parents do not make a voluntary contribution.
- Stress, however, that if sufficient financial support is not forthcoming that the visit may have to be cancelled.
- State when and how you would like to receive payment

A formal approval from the SLT must be sought before deposits paid. (for example, to decide whether the planned trip is financially viable)

10 Insurance

Introduction

Insurance is an area where misconceptions abound. It is too important to be left to chance and those involved with schools [teachers, pupils and parents] need to be sure of the nature and level of cover which is provided, both according to statutory requirements and that which may be additionally obtained on a voluntary basis through premium payments.

The following advice will help clarify some of the many queries which are raised, though it does not replace the need for individuals to seek information on insurance from their LEA, school or professional association which is pertinent to their own circumstances.

Personal

The teacher, in common with all other employed persons, is covered against industrial injuries by the weekly contribution which must be paid during employment. In addition, all employed persons have a possible claim against their employer if they sustain any bodily injury by accident arising out of, or in the course of, their employment. Such claims can only be substantiated where injury can be proved to be through negligence of the employer or another employee [Employers Liability].

In respect of pupils, schools have a legal duty to take care of the wellbeing and safety of young people. Where there is a breach of this responsibility a claim for compensation may be brought. There is no requirement for schools to make provision for loss through personal injury as the result of an accident where no blame may be attached. Personal accident insurance cover for pupils is a matter for the parents to arrange.

Indemnity

Please see reference to parental Consent: -
OEAP National Guidance Document

www.oeapng.info 4.3d-Parental-Consent

Insurance Provision

Teachers should be aware of the school provision for insurance.
See: Copy schedule of School Insurance for off-site visits: **Appendix 3**

11 Transport

See School Transport Policy -
Also see guidance from OEAP NG -
4.Sa-Transport-A-general-considerations 4.Sc-Transport-in-private-cars

See School Minibus Policy

12 Critical Incident Procedures

See OEAP National Guidance document:
<http://oeapng.info> 1a-Critical-Incident-Management-Employer

- a. All leaders must carry the school's 'Critical Incident form' With Emergency Telephone contacts and action plan should an incident happen.
- b. On return, the visit leader must comply with the school's normal accident reporting procedures.

DfE guidance : Health & Safety on Educational Visits (Nov 2018 Section 6)

Guidance for Educational Visits 2024/25

13 Monitoring and Evaluation

After any visit, it is good practice to ensure a system of feedback, review and rigorous evaluation. In the case of overseas visits, there is a particularly strong case for ensuring this takes place and includes the consultation of the young people concerned, the parents, the leaders and partner organisations. Such a process will help in the celebration of success as well as feeding in to the general planning and risk management for future visits. Any significant issues should be shared with the EVC, the Head/Manager and the employer's advisory team. Use attached evaluation sheet and attach to the generic risk assessment sheet for local area visits (Appendix) and complete the evaluation form on EVOLVE for other trips.

DfE guidance : Health & Safety on Educational Visits (Nov 2018 Section 7)
Guidance for Educational Visits 2024/25

All links to guidance documents noted should be accessed via the www.oeapng.info site
To access the most current advice/guidance. Use the keyword search to locate any document.

Reviewed:	Spring 2025
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Next revision due:	Spring 2028
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Appendix 1

Extended Learning Locality (Local Area Visit)

Local Learning Area *(Blue text COVIO related)*

General

Visits/activities within the 'Local Learning Area' that are part of the normal curriculum and take place during the normal school day follow the Operating Procedure below.

These visits/activities:

- must be recorded on a 'Signing-out' sheet to be left with the office)
- If Children are being transported in the school minibus parental consent must be obtained
If children are not being transported in the school minibus - eg walking parental consent is not required though parents do need to be informed that their child will be off the school site
- Visit Leaders of All Local Learning Area Visits must complete the signing out sheet and generic risk assessment prior to the Visit. These should be shared with the EVC in advance (a week before) and updated on the day to include the actual attendance of individual pupils

Boundaries

The boundaries of the Local Learning Area are shown on the attached map. This area includes, but is not limited to, the following frequently used venues:

- Other Harwich Schools
- Bobbits Hole
- Beacon Hill Fort
- Dovercourt Beach

Operating Procedure for Local Learning Area

- The following are potentially significant issues/hazards within our Local Learning Area:
 - Road traffic.
 - Other people
 - social distancing
 - members of the public
- Losing a pupil.
- Uneven surfaces and slips, trips, and falls.
- Weather conditions.
- Activity specific issues when doing fieldwork (nettles, brambles, rubbish, etc).
- Hazards at the sea/beach if visiting Dovercourt beach

These are managed by a combination of the

following:

- **The Head or EVC must give verbal approval before a group leaves.**
- **Only staff judged competent to supervise groups in this environment are approved. A current list of approved staff is maintained by the EVC and office.**
- **The concept and Operating Procedure of the 'Local Learning Area' is explained to all new parents when their child joins the school, and a synopsis is in the School Prospectus.**
- Regular handwashing or regular hand sanitising is in place
- Students are briefed on keeping their distance from members of the public
- The selected route takes the least busy option
- Use antibacterial wipes to clean any equipment before use
- **There will normally be a minimum of two adults.**
- **Staff are familiar with the area, including any 'no-go' areas, and have practiced appropriate group management techniques.**
- **Pupils have been trained and have practiced standard techniques for road crossings in a group.**
- **Pupils' clothing and footwear is checked for appropriateness prior to leaving school.**
- **Staff are aware of any relevant pupil medical information and ensure that any required medication is available.**
- **A mobile is taken with each group and the office have a note of the number.**
- **Appropriate personal protective equipment is taken when needed (eg gloves, facemasks bag for waste, tissues etc.)**



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Appendix 2

Signing-out sheet for ad-hoc activities in the school locality, where the school policy addresses the generic risk management issues.

Leave this completed form in the office or agreed place when you go out

Date	
Visit Leader	
Accompanying Staff	
Volunteers	
Group/Class/Form	
Activity	
Destination/venue details	
First Aid kit/ Emergency Card taken?	
Time out	
Time back	
Contact number	
Any other relevant details/issues (eg pupil medical/behavioural needs)	

Appendix 3

Generic and Site/Person Specific risk assessment

Generic Risk Assessment for Off-site Visit

This generic risk assessment is designed to prompt the Specific Risk Assessment carried out by the school/establishment.

1. Significant Hazards and Identification of Risks: <i>Those hazards and risks that may result in serious harm or affect several people</i>	2. Control Measures: <i>Controls, including relevant sources of guidance</i>

Appendix 4

Critical Incident Procedure ACTION PLAN

Please follow the steps below to help manage emergencies effectively

Action by Visit Leader Establish nature and extent of emergency. Identify people involved and any	Any Casualties? Member of staff to accompany them to hospital with relevant medical details. Staff name and contact number?
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1 Check your group Are the group safe? Are all group members accounted for? Are all leaders present?	1 Notify Establishment Base Your establishment emergency contacts Name:.....Tel.....Mobile..... Name:.....Tel..... Mobile..... Information needed: What happened? When - date & time? Where - location?
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Agree contact numbers to use and pattern of future contact

Action by Establishment

Launch the critical incident plan Follow and adapt if necessary. Involve outside support if required	Is this Critical Incident? YES	Agree actions with Visit Leader, e.g. Contact with parents? Seek advice from Education Officers? Seek advice from OE Advisors? Media management by establishment? Insurance?
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Ongoing Record of incident Follow up paperwork
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Appendix 5

Chase Lane Primary School and Nursery

Booking Form for Trips

Name of Class Teacher and Year Group	
Destination	
Cost of trip / activity	
Date	
Departure time (leaving school)	
Return time (leaving destination)	
Arrival time (arriving back at school)	
Number of seats (including adults)	
Office to complete below:	
Coach Company	
Cost	
Price per pupil	

Signed.....

Date

Appendix 6



National
Guidance

<http://oeapnq.info>

Visit Leader Check List

This list is designed as a final check on visit planning. The relevance of the bullet points and the complexity of the responses are dependent on the nature of the particular visit. For each of the points, further information about good practice can be found elsewhere in this guidance.

- D** The benefits and risks of all aspects of the visit have been considered and the visit plan has an appropriate balance and an acceptable level of residual risk.
- D** The visit plan has involved leaders and helpers before the visit and they are clear about what they are expected to do in order to manage the risks.

Content and Aims

- D** There are clear and well-considered aims that are particular to the learning and development of the group as a whole and individuals within it, which contribute to the wider curriculum or ethos of the establishment
- D** Evaluation and visit review arrangements are in place.

The process has led to a visit plan addressing the following variables:

Staffing

- D** I am clearly identified as the Visit Leader and approved by the establishment.
- D** All members of the Visit Leadership Team are sufficiently confident and competent to fulfil their designated role.
- D** There are sufficient leaders to ensure effective supervision and deal with incidents and emergencies.
- D** All members of the Visit Leadership Team have received all relevant information on both the visit and the group.
- D** If accompanying leaders are taking a family member on the visit, there are arrangements to ensure that this will not compromise group management.
- D** I have kept my EVC informed during the planning process.

Post-visit review

Please complete the below following any educational visit.

Visit Leader: _____

Date of visit: _____

Venue name: _____

Number of pupils: _____

Form completed by: _____

- Was the venue suitable?
- Was the accommodation / food / equipment of a suitable standard?
- Were the travel arrangements appropriate?
- Were the educational objectives met?
- Was the content of programme relevant to the group?
- Were agreed procedures followed by all in a supervisory capacity?
- What, if anything, could be done to improve this visit?
- Are there any specific issues which need to be addressed as a result of this visit?

Appendix 8



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Surrey RH1 1LQ
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stephen.curl@aon.co.uk

Essex County Council ("you")
County Hall
Market Road
Chelmsford
Essex, CM1 1QH

02 April 2024

Dear Essex County Council,

Client Information Letter

We, Aon UK Limited, are insurance brokers acting on your behalf only in accordance with our terms of business agreement. We have agreed to provide this letter to confirm that the contract(s) of insurance described on the attached pages (the 'insurances') are in force at the date of this letter.

All of the Insurances are subject to their specific policy terms, conditions and exceptions, not all of which may be summarised on the attachment. Please refer to the actual policies if full terms and conditions are required.

We accept no obligation to inform any other person or entity should any of the Insurances be cancelled, assigned or changed in such manner as to affect the accuracy of this document. Unless we specifically agree otherwise in writing, and to the fullest extent permitted by law, we do not accept any liability to anyone other than you, our client (and any such liability to you will be subject to the limitations contained in our terms of business agreement, and/or any other agreement, with you) for the content of this letter and its attachments.

Yours sincerely

Stephen Curl
Client Service Adviser
For and on behalf of Aon UK Limited

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1 of 2

Attachment to letter dated 02 April 2024



The Insurances

Public & Products Liability

Insured	Essex County Council
Insurer	Aspen Insurance UK Ltd
Policy Number	I0A850623A0R / I0A850623B0R
Policy Period	1 st April 2024 to 31 st March 2025, both dates inclusive
Cover	Legal liability to pay damages and claimants costs arising out of or in connection with injury to third parties or loss or damage to their property during the period of insurance and in the course of the Business
Limit of Indemnity	- Public Liability - £25,000,000 any one occurrence - Product Liability - £25,000,000 in all in the Period of Insurance
Deductible	- Public Liability - £1,500,000 each and every claim - Product Liability - £1,500,000 each and every claim An Aggregate Stop of £5,500,000 applies to all Sections of this Policy

Excess Public & Products Liability

Insured	Essex County Council
Insurer	Chubb European Group SE
Policy Number	UKCANC85188
Policy Period	1 st April 2024 to 31 st March 2025, both dates inclusive
Cover	Additional layer of liability which follows the underlying cover provided by the Primary insurers unless stated otherwise
Limit of Indemnity	- Public Liability - £25,000,000 in excess of £25,000,000 any one occurrence - Products Liability - £25,000,000 in excess of £25,000,000 in the aggregate
Deductible	£Nil



PRIVATE CAR TRANSPORT POLICY JANUARY 2025

Title: Private Car Transport Policy

Function: Information and Reference

Subject Category: Safeguarding

Audience: All staff and governors

Date of Review: Jan 2025

Member of Staff Responsible: Headteacher and EVC

On occasions, the use of private cars for transporting small numbers of people may be required (e.g. the sports team, music/choir events, photography club to a different location).

When we organise transport in private cars we have a legal duty of care and may be liable in the event of a claim following an incident. In line with our safeguarding policy, only EMPLOYEES of Chase Lane Primary School and Nursery are permitted to transport pupils in their private cars.

At Chase Lane we ensure that:

- All drivers properly understand their duty of care and agree responsibilities for supervisions
- The vehicle is safe. This means that it holds a valid MOT certificate where relevant, that the driver certifies it has been serviced in line with the manufacturer's schedule, and that the driver carries out any pre-use checks specified to the manufacturer.
- The driver is suitable. All drivers must have a full, clean and valid driving licence for the class of vehicle they own. These can be checked at <https://www.gov.uk/check-driving-information>
- All drivers must have fully comprehensive insurance cover when carrying children. Members of staff are asked to check that their car in their own private cars.
- All vehicles must conform to all legal requirements; having an annual, valid MOT and Tax. These can be checked at <https://www.gov.uk/get-vehicle-information-from-dvla>
- Each child must be restrained by a seat or lap belt and no child should be transported in the front passenger seat.
- Drivers must refer to the following documents to ensure the correct use of a child seat <https://www.gov.uk/child-car-seats-the-rules>
- No adults should be 1:1 with a child when using their own private vehicle for transportation
- Consideration will be given to the potential distraction of the driver and the supervision of the passengers. A judgement will be made with a member of the SLT about the likely behaviour and individual need of passengers. This information will form part of the risk assessment for the trip
- The teacher in charge will ensure the permission has been obtained from the parent to ensure that all parties are fully informed of the transport to and from events

Drivers must ensure that the office holds a copy of the following BEFORE transporting children in private car:

- The driver's full UK driving licence.
- The insurance policy for the vehicle to be used. (inc. evidence of 'business use' cover)
- The MOT certificate for the vehicle to be used.
- Parental consent for each child to be transported

The School Business Manager will carry out necessary checks with staff and keep evidence that these checks have been carried out



Guidance for Educational Visits

2024/25

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1 General

The purpose of this document is to link the requirements of JUNIPER EDUCATION with National Guidance and EVOLVE.

JUNIPER EDUCATION (the Lead Approver) acknowledges the immense value of off- site visits and related activities to young people, and fully supports and encourages those that are well planned and managed.

The Lead Approver adopts the OEAP's 'National Guidance' (NG): www.oeapng.info
References throughout this document hyperlink to specific documents within National Guidance.

In line with current good practice in over [28,000 educational establishments](#), the Lead Approver uses the robust web-based system 'EVOLVE' to facilitate the efficient planning, management, approval, and evaluation of visits www.evolve.online. All staff that lead or accompany visits have their own EVOLVE account, which is set up by their school's Educational Visits Coordinator (EVC). As well as a planning tool for staff, EVOLVE also includes additional features such as search and report facilities, downloadable resources, staff records and visit history, plus links to both National Guidance and the National Library www.national-library.info.

The 'starting point' for this document echoes National Guidance, in that the key to effective and successful outdoor learning and off-site visits is: the right leaders doing the right activities with the right young people in the right places at the right times.

The Lead Approver has commissioned EVOLVE Advice to provide advice, guidance, and support to its schools.

Refer to National Guidance document 1.b [Foundations](#)

2 Responsibilities

The Health and Safety at Work etc Act 1974 places overall responsibility for health and safety on educational visits with the employer.

Details about who the employer is can be found in National Guidance document [1c Status Remit and Rationale](#)

All persons involved in a visit have a specific responsibility which they should be clear about prior to the visit taking place.

Refer to National Guidance [Checklists](#)

3 Educational Visits

Coordinator Training & Role

To help fulfil its health and safety obligations for visits and to comply with [DfE Guidance](#), schools are encouraged to appoint an Educational Visits Coordinator (EVC) who will support the Headteacher. In small schools the Headteacher may be the EVC. Should the school choose not to appoint an EVC, those functions will automatically fall to the Headteacher.

The EVC should attend EVC training (minimum 6 hours) as soon as possible after appointment.

Training provided by a reputable provider is acceptable (such as the courses provided by www.evolveadvice.co.uk). Training may be face-to-face or 'blended', i.e. part e- learning, part webinar – e-learning alone is not sufficient.

Thereafter, update EVC Training or a repeat full course is recommended on a 3 yearly basis.

The EVC should ensure that a record of their training is logged on EVOLVE, as all Visit Forms link to this.

The EVC (or an 'EVC Admin Support') user is responsible for setting up and disabling all EVOLVE accounts (a requirement under UK GDPR). This process is automated via a direct MIS link for schools that subscribe to [EVOLVE+](#) or [Premium EVOLVE](#).

The EVC should support the Headteacher in ensuring that competent staff are assigned to lead and accompany visits, see [Section 11](#), and with approval and other decisions.

The EVC must ensure that a policy is in place for educational and off-site visits, and that this is updated as necessary. This should be uploaded to EVOLVE resources.

Schools should ensure their trained EVCs are listed on the [EVC Register](#).

Refer to National Guidance [Educational Visits Coordinator](#)

4 Visit Leader Training & Role

All leaders have a legal duty of care and must comply with the employer's policy and guidance.

The Visit Leader has overall responsibility for a visit. This includes the learning, development, supervision and welfare of the participants and the health and safety of all, including any other leaders and helpers.

In order to help ensure the safety of participants, and to maximise learning outcomes and enjoyment, it is recommended that visit leaders complete a Visit Leader Training Course.

Visit Leader Training provided by any reputable training provider is acceptable.

Training may be face-to-face, 'blended', or via e-Learning, such as the courses provided by <https://www.evolveadvice.co.uk/vl-training>

5 Approval

Final approval is delegated to the Headteacher for all visits, with the exception of:

- Overseas visits
- Residential visits
- Adventurous activity visits

which require The Lead Approver approval. These visits should be submitted to the Lead Approver at least 4 weeks in advance.

In approving visits, the Head and EVC should ensure that the visit leader has been appropriately inducted/trained, and is competent to lead the visit, see [Section 11](#)

What does 'Visit Approved by the Lead Approver' mean?

When the Headteacher authorises a visit on EVOLVE, they are confirming that the visit complies with school and the Lead Approver policy, and that in their opinion the visit leader and any accompanying staff are competent to supervise the visit.

This task can only be the responsibility of the Headteacher/Senior Management, as the Lead Approver does not have first-hand knowledge of the intended participants or of the competence of the staff team in order to make this decision.

The Lead Approver therefore relies on the Headteacher to make an appropriate

professional judgement prior to authorising visits, by taking all aspects into account, including but not limited to:

- The competence of the visit leader
- The competence of the accompanying staff
- The ages and level of maturity of pupils, including those with special needs
- The intended learning outcomes
- The proposed itinerary
- The contingency plans in place (eg. Plan B)

The Lead Approver assumes that the Headteacher would not submit the visit for LA approval if they were not satisfied with the intended arrangements.

Although all visits requiring the Lead Approver approval are viewed, it is not feasible for the Lead Approver to scrutinise in detail all information and attachments, and so this is undertaken on a 'sample' basis.

The exception to the above is where school staff lead adventurous activities themselves (ie. not using an external provider). In these instances it is unlikely that the Headteacher will have the necessary expertise to assess the technical competence of the activity leader, and therefore this task is carried out by the Lead Approver.

Refer to National Guidance document 1b [Foundations](#)

6 Outcomes

Clarity regarding the intended outcomes of the visit will help to ensure that the potential benefits can be achieved. Up to four 'intended' outcomes may be recorded on EVOLVE during the planning process, for subsequent evaluation.

Work that takes place outside the classroom can provide a very powerful means of developing learning in all curriculum areas, and raise attainment. Experiential learning can also provide opportunities for development in other areas, including:

- Relationships
- Emotional & spiritual
- Cross curricular
- Individual
- Teamwork
- Environmental

Preparatory work should take place in advance of the visit where appropriate. This, in conjunction with activity that will take place during the visit, should feed into any follow up work.

Refer to National Guidance document 5.1c [Learning Outside and Off-site visits: self-evaluation using the Ofsted framework](#)

[High Quality Outdoor Learning](#) can be used as a tool by visit leaders to assist in both identifying outcomes and in the evaluation of the learning taking place. It can also help the leader in providing clarity to a provider when designing a programme.

7 Inclusion

Under the Equality Act 2010, it is unlawful to discriminate against disabled participants because of their disability, without material or substantial justification. You are required to make reasonable adjustments to avoid participants being placed at a substantial disadvantage. However, the Equality Act does not require responsible bodies to place employees or participants at inappropriate risk if a health and safety issue arises. It is also the case that the adjustments made to include a disabled young person should not impinge unduly on the planned purpose of the activity.

It is recommended that students have the opportunity to engage with visits in ways that affirm their identities. This guidance is based on best practice, and should be applied wherever possible, unless the legal context prohibits.

On overnight educational visits, children and young people should be allowed use of an overnight facility that aligns with their gender identity. Students should also have access to other facilities, such as restrooms and changing rooms, that align with their gender identity.

Transgender people may determine which facilities they feel safest and most comfortable using. Any person who is uncomfortable using a shared facility, regardless of the reason, should have access to a safe, practical, and non-stigmatizing alternative.

All students and parents/carers should be given the opportunity to express wishes around rooming on visits. Transgender students, in particular, should be consulted in the trip planning process, to address any potential concerns and needs for privacy. In all cases, student safety should be placed as a top priority.

If using home stays, students who have disclosed their LGBTQ+ status to the trip organizer should be placed in homes that have been assessed for the safety of these students. A student's gender or sexual identity should not be disclosed to home stay providers without the student's explicit consent.

Under no circumstances should an LGBTQ+ student be denied the opportunity to participate in overnight trips or other opportunities on the basis of their identity. The trip organisers should make all efforts to accommodate any student who desires greater privacy in overnight trips. If the context of a trip is inherently unsafe for LGBTQ+ people, it is recommended that the location or context be reconsidered to ensure safe travel for all participants.

Refer to National Guidance documents 3.2e [*Inclusion and 4-4I transgender-young-people-and-visits*](#)

8 Planning - Risk Management - What to Record and How?

Note: Risk management during visits is covered in [Section 9 - Safety During the Visit](#)

How much planning?

The extent of planning required is related to the complexity of the visit, see:

[EVOLVE Planning Chart \(pdf\)](#)

[EVOLVE Planning Chart \(video\)](#)

National Guidance document 4.3c [Risk Management - an overview](#)

Two levels of documentation: Generic/Event Specific

Generic documents can be used to cover the significant risks that you would always expect to manage in any relevant experience or activity. They include school policies, National Guidance, and the Lead Approver guidance. They should ideally include a Local Area Visits policy (see below), and procedures for managing routine activities, such as using transport, supervision of swimming pool changing areas, dismissal of students from venues, etc.

Event Specific documents could record all significant findings for a particular visit, or they may simply record issues not covered by existing generic documents. Note: If existing generic documents cover everything then there is no need to repeat anything.

‘Local Area Visits’ (if designated)

This refers to specified visits/activities within a designated geographical area that are part of the normal curriculum and take place during the normal school day. If the school has designated a Local Learning Area, then these activities should simply follow the Standard Operating Procedures stated, and do not normally need additional documentation. An example ‘Local Learning Area’ template for adaptation can be found in EVOLVE/Resources/Forms.

Activities in the Local Learning Area should be recorded either via the EVOLVE Local Visits module (if activated), or via a ‘Signing Out’ sheet left with the school office before departure. See ‘Example signing-out sheet’ in EVOLVE/Resources/Forms.

If desired, and where parental consent is obtained, activities outside normal school hours could be included within the Local Learning Area policy, such as after school clubs, sports fixtures, evening activities, etc.

It is recommended that where a school has designated its own Local Learning Area, a copy of the adapted document is uploaded to EVOLVE/Resources/ Establishment Docs for staff reference.

The remainder of the section relates to activities outside the Local Visits Area

Activities that are not included within your Local Learning Area will be more complex in nature and therefore need additional planning and risk management. These will include the following:

- Day visits that are more complex or further afield
- Overseas visits
- Residential visits
- Adventurous activities

Planning Meeting

In the early stages of planning it is good practice for the visit leader to convene a 'Planning Meeting', ideally including all staff involved in the visit. This Planning Meeting will provide the opportunity for information to be shared amongst colleagues, discussions to take place, decisions made, and for relevant details to be recorded. Such a meeting helps ensure that everyone understands the plan and that everyone has opportunity to contribute to it. This process of sharing, discussion, decision making, and recording should be ongoing throughout the planning phase.

What to record and how?

It is recommended that all visits are recorded on EVOLVE, as this reduces bureaucracy, ensures that a robust audit trail exists, and helps evidence learning outcomes.

EVOLVE provides a means of recording and sharing visit planning, and enables the EVC and Headteacher to contribute to, support, and monitor the activity.

'Risk assessment' is a process, and not a document. HSE legislation dictates that the significant findings of the risk assessment process must be recorded, but it does not state any particular format for this. The 'significant findings' are a combination of the identified issues and what is being done about these. There is no legal requirement to document the findings of the risk assessment process in any particular format, therefore it is up to the school and visit leadership team to decide what format works best and will be most useful for them. Options could include

any, or a combination of the following:

- Event Specific Plan on EVOLVE
- A traditional completed template/form (uploaded to EVOLVE)
- A mind-map or annotated illustrations (photographed and uploaded to EVOLVE)
- Handwritten notes (photographed or scanned and uploaded to EVOLVE)
- Audio or video files, e.g. of a staff meeting (uploaded to EVOLVE)

Information recorded could include:

- Planning notes, decisions made, comments, etc.
- Participant briefing notes and 'rules'
- Operating procedures
- Event Specific Notes
- Risk assessment findings
- Other documents, eg. letter/s to parents, itinerary, kit list, etc.

Additional notes on risk management

- It is not possible to eliminate all risks, but they should be reduced to an *acceptable* or *tolerable* level. Planning should achieve a rational balance between potential adverse risks and the intended benefits and outcomes of the activity - see [Managing Risk in Play Provision](#). An activity should only take place if, in the professional judgement of the leader, the residual risk following implementation of any control measures is deemed to be acceptable.
- It is good practice to involve participants in the planning and organisation of visits, as in doing so they will make more informed decisions, will become more 'risk aware' and hence at less risk. They will also have greater ownership of the event. This is endorsed by HSE in [Principles of Sensible Risk Management](#)
- Alternative arrangements (Plan B) should be included within the planning process where appropriate, for example, where weather conditions or water levels might be critical, or where an overcrowded venue might necessitate an alternative option.
- Where an adventurous activity is to be delivered by an external provider, the provider will have responsibility for managing the activity (see [Section 31](#)). As such, the provider's risk assessments are not the concern of the school leader, do not need to be requested from the provider, and do not need to be uploaded to EVOLVE. See National Guidance document 6a [FAQ Asking for a provider's risk assessments](#)

- To inform future visits, it is good practice to record any significant issues following the visit evaluation.

Refer to the [STAGED approach booklet](#) to support the planning

Refer to National Guidance documents:

4.3c [Risk Management - an overview](#)

4.3g [What to Record and How](#)

4.3c [Risk Management - some practical advice for leaders](#)

9 Safety During the Visit/Ongoing Risk Assessment

Prior to the visit, staff must ensure that all participants understand what is expected of them. This includes any 'rules' that will be in place. These should be re-emphasised as appropriate during the visit.

The on-going monitoring of all aspects of the visit by the leader and accompanying staff is an essential aspect in the risk management of visits, and hence the safety of participants. It also contributes towards enjoyment and learning.

Risks should therefore be monitored throughout the visit, and where appropriate activities must be modified (e.g. Plan B), or curtailed, to suit changed or changing circumstances, for example: an over-busy lunch area, rain, rising water levels, etc. This is primarily the responsibility of the visit leader, in consultation with other staff where appropriate.

Following the visit, the visit leader should record any significant issues as a note on EVOLVE, for both reference, and to inform future visits.

Refer to National Guidance documents: 4.3c [Risk Management - an Overview](#)

3.4k [Responsibilities of the Visit Leader](#)

10 Parent/Carer Consent

Schools:

Written consent from parents is not required for pupils to take part in the majority of off-site activities organised by a school (with the exception of nursery age children) as most of these activities take place during school hours and are a normal part of a child's education at school. However, it is good practice to inform parents of these activities.

Written consent is usually only required for activities that need a higher level of risk management or those that take place outside school hours. Parents must be informed of these activities in advance, and given the opportunity to withdraw their child from any particular visit or activity covered by the form.

The school must have a robust means of ensuring that changes to parent/carers contact details and child medical details are up-to-date.

Electronic consent (e-consent), via EVOLVE is recommended as this is a more robust alternative to paper-based consent forms. Other e-consent, such as via Parent Pay is acceptable provided the consent links directly to parental information.

Other establishments:

Annual consent is appropriate for regular routine activities.

For all other visits, consent should be obtained on an individual visit basis. Information provided to parents prior to granting consent should include full details of the activities and all other significant information.

All: Refer to National Guidance document 4.3d [Parental Consent](#)

11 Competence to Lead

The competence of the visit leader is the single most important contributory factor in the safety of participants.

The EVC and/or Headteacher must therefore 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 Staff History on EVOLVE).
- b) Has the leader completed a Visit Leader Training course? (see [Section 3](#))
- c) Is the leader competent in planning and managing visits?
- d) What are the leader's reasons for undertaking the visit?
- e) Is the leader an employee of the Lead Approver/trust/school?
- f) Does the leader have the ability to manage the pastoral welfare of participants?
- g) Does the leader exhibit sound decision-making abilities?
- h) What experience has the leader of the participants they intend to supervise?
- i) What experience has the leader of the environment and geographical area chosen?
- j) Does the leader possess appropriate qualifications?
- k) If appropriate, what is the leader's personal level of skill in the activity, and fitness level?
- l) If leading adventurous activities, has this been 'approved' by the Lead Approver?
- m) Is the leader aware of all relevant guidelines and able to comply with these?

Refer to National Guidance document 3.2d [Approval of leaders](#)

12 Staffing and Supervision

On all visits there must be an 'effective level of supervision' that has been approved by the EVC and Headteacher, and where applicable is in accordance with Governing Body policy.

The [Statutory Framework for the Early Years Foundation Stage](#) no longer differentiates between outings and on-site settings as regards minimum specified ratios.

For all other visits the visit leader, EVC and Headteacher must make a professional judgement regarding the number and suitability of staffing on an individual visit basis, after consideration of the following factors:

- The type, level, and duration of activity.

- The nature/requirements of individuals within the group, including those with additional needs.
- The experience and competence of staff and other adults.
- The venue, time of year and prevailing/predicted conditions, if applicable.
- The contingency, or 'Plan B' options.

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

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.

Refer to National Guidance document 4.2a [*Group management and supervision*](#)

Vetting and Disclosure and Barring (DBS) Checks

Staff and volunteers who work *frequently* or *intensively* with, or have regular access to young people or vulnerable adults, must undergo an enhanced DBS check with barred list check as part of their recruitment process. For the purpose of this guidance:

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

Refer to National Guidance document 3.2g [*Vetting and DBS Checks*](#)

Direct, Indirect and Remote Supervision

Young people must be supervised throughout all visits, even though they may be unaccompanied at times.

Direct supervision is where a member of staff is with a young person/group.

Indirect supervision is where young people are unaccompanied by a member of staff, but where there is a member of staff in the vicinity, for example as might occur in a museum or shopping centre, or 'down-time' at an activity centre.

Remote supervision is where young people are unaccompanied by a member of staff, and the supervising member of staff is not necessarily in the immediate vicinity, for example as might occur during D of E expeditions, or a 6th Form unaccompanied visit to university open day.

Both Indirect and Remotely supervised activities can bring valuable educational benefits, and the progression from dependence to independence is to be encouraged. Such activities develop essential lifelong skills, including learning to manage risk, self-sufficiency, interaction with the public, social skills,

communication, decision making, etc.

The decision to allow indirect or remote supervision should be based on professional judgement taking into account such factors as:

- prior knowledge of the individuals (including their maturity and levels of responsibility);
- venue and conditions;
- the activity taking place;
- preparatory training;
- the competence of the supervising staff;
- the emergency systems in place.

When recording a remotely supervised visit on EVOLVE, there must still be a named visit leader. This will be the member of staff that has made a professional judgement regarding the level of responsibility and maturity of the participants, and decided that in their opinion it is reasonable for them to be undertaking the specific activity unaccompanied by an adult. A 'Note' should be added to EVOLVE specifying that remote supervision applies.

Refer to National Guidance documents: 4.3b [*Ratios and Effective Supervision*](#)

4.2a [*Group Management and Supervision*](#)

3.2g [*Vetting and DBS Checks*](#)

13 First Aid

For all visits there should be a responsible adult with a good working knowledge of first aid appropriate to the environment (e.g. urban, remote, water, etc.)

General 'life experience', or a 3 hour non-assessed 'Basic Skills' course is suitable for routine urban visits. However, the nature of the visit may indicate that a higher level qualification is appropriate, especially in circumstances where it is likely that access by the emergency services may be delayed.

Based on the nature of the particular visit, the EVC (or visit leader) should make a professional judgement regarding the level of first aid required.

A first aid kit appropriate to the visit should be carried.

For EYFS outings, there must always be at least one member of staff present who holds a current Paediatric First Aid certificate.

edSAFETY has developed a [3 hour First Aid for Educational Visits](#) course to aid for low level visits.

Refer to National Guidance document 4.4b [First Aid](#)

Refer to: [Statutory Framework for the Early Years Foundation Stage](#)

14 Insurance

Advice regarding insurance may be sought from the Lead Approver's Insurance section.

At the time of writing, for travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all eligible participants must hold a valid GHIC (Global Health Insurance Card). See www.dh.gov.uk

Refer to National Guidance document 4.4c [Insurance](#)

15 Travel

ALL

Refer to National Guidance document 4.5a [Transport general considerations](#)

PRIVATE CARS

Where a private (staff or parent) car is to be used to transport young people then this must be approved by the Headteacher, and a [PRIVATE CAR](#) Form must be completed and retained by the school (on an annual basis if appropriate).

Refer to National Guidance documents 4.5c [Transport in private cars](#)

COACHES

The Lead Approver does not 'approve' coach companies. Whilst UK legislation ensures that coach companies are fit for public use, the facilities available on coaches may vary. Liaising with other schools within the Lead Approver that have used a particular company (via. EVOLVE/RESOURCES/SEARCH) will help to determine the level of service that may be provided.

Refer to National Guidance document 4.5e [Hiring a coach](#)

MINIBUSES

Schools that own or hire a minibus must have an operational policy in place for this.

Refer to National Guidance document 4.5b [Transport in minibuses](#)

WALKING/CROSSING ROADS

This is undoubtedly one of the more dangerous activities leaders and groups will undertake. It should not be assumed that motorists understand or are aware of the needs of the group or of common practices.

Technically, only the police, traffic wardens and officially designated school crossing patrols have the right under law to control traffic. Liaison with the local police may well enable an agreement to be reached over a particular crossing strategy and the use of high-viz tabards or similar. This liaison is recommended where practical. Leaders should consider a progression of options for road crossings:

- Is it possible to plan a route which requires no road crossing at all?
- If roads must be crossed, is it possible to use formal crossing points (e.g. Bridges, Zebra, Pelican...)?
- If no formal point available, consider the 'Wave' approach (see below for operational practice)
- If none of the above are possible, and having established that there is not a suitable alternative, it is important to have an agreed and understood procedure which you

can apply as well as circumstances allow, as would a responsible person. Focus on a professional approach to Dynamic Risk management, taking account of the group, the leaders, the location and the conditions (traffic, weather, etc.) at the time

- NB: Other than at light controlled or Zebra crossings, cross only when the road is clear of traffic. Do not deliberately plan to physically stop traffic, and do not put adults in the way of moving vehicles. If using light controlled or Zebra crossings, ensure all vehicles have stopped and registered your presence and intentions before crossing. Try to gain eye contact with drivers, and monitor all children and traffic throughout. If in doubt, do not proceed.

16 Farm Visits

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

Refer to National Guidance document 7g [*Farm Visits*](#)

GOV.UK

1. Home (<https://www.gov.uk/>)
 2. Education, training and skills (<https://www.gov.uk/education>)
 3. Pupil wellbeing, behaviour and attendance (<https://www.gov.uk/education/pupil-wellbeing-behaviour-and-attendance>)
 4. Health, safety and wellbeing in schools (<https://www.gov.uk/education/health-safety-and-wellbeing-in-schools>)
 5. Health and safety: advice for schools (<https://www.gov.uk/government/publications/health-and-safety-advice-for-schools>)
- Department for Education (<https://www.gov.uk/government/organisations/department-for-education>)

Guidance

Health and safety: responsibilities and duties for schools

Updated 26 November 2018

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1. Responsibilities

Pupils should be safe in school and when undertaking out of school activities. The risk management to keep them safe should be proportionate to the nature of the activities.

Teachers should be able to take pupils on exciting school trips that broaden their horizons. Pupils should be able to play freely in the playground and be able to take part in sports. Read the Health and Safety Executive (HSE) guidance on children's play and leisure (<http://www.hse.gov.uk/entertainment/childs-play-statement.htm>) for more information.

The employer or, in the case of independent schools, the proprietor, is accountable for the health and safety of school staff and pupils. The day-to-day running of the school is usually delegated to the headteacher and the school management team. In most cases, they are responsible for ensuring that risks are managed effectively. This includes health and safety matters.

Schools must appoint a competent person to ensure they meet their health and safety duties. A competent person is someone with the necessary skills, knowledge and experience to give sensible guidance about managing the health and safety risks at the school.

This can be someone appointed directly by the school, one or more of its staff, or the employer can arrange support from outside the school. In most schools, the senior leadership team can manage risks. Read further guidance from HSE (<http://www.hse.gov.uk/services/education/faqs.htm>).

The Association for Physical Education (AfPE) (<http://www.afpe.org.uk/>) can offer advice on insurance for PE teachers.

2. Leadership

Commitment from senior management is essential for effective health and safety management. Strong leadership is also vital. HSE provides information on leading health and safety at work (<http://www.hse.gov.uk/leadership/>).

Schools must have a health and safety policy in place. This should be an integral part of the school's culture, values and performance standards. The key elements of the policy should:

- set out the roles and responsibilities within risk management processes
- the mechanisms to control risk
- specific control measures that need to be implemented

In most schools, the headteacher is responsible for implementing this. Based on a thorough risk assessment, they should update it to reduce and reflect new risks. The risk assessment must cover the risks to the health and safety of employees and of persons (including pupils) who are not employees of the school.

Review the assessment if:

- there is any reason to suspect that it is no longer valid
- there has been a significant change in related matters

Schools are obliged to record significant findings of the assessment. They must identify any group of employees identified by it as being especially at risk.

Read the HSE's further information on accountability for health and safety in a school (<http://www.hse.gov.uk/services/education/sensible-leadership/school-leaders.htm>) and sources of competent guidance (<http://www.hse.gov.uk/business/competent-advice.htm>) on health and safety.

If senior leaders or teachers feel the process is inappropriate, they should discuss this with their employer. Examples may include processes which are too bureaucratic or which do not mitigate risk sufficiently. All staff can request that procedures be reviewed.

3. Elements of a health and safety policy

Every health and safety policy is separated into 4 elements:

- Plan - leaders should set the direction for effective health and safety management
- Do - introduce management systems and practices that ensure risks are dealt with sensibly, responsibly and proportionately
- Check - monitoring and reporting
- Act - a formal management review of health and safety performance

LEADS explains the elements in more detail in its guidance on leading health and safety at work (<http://www.hse.gov.uk/leadership/>).

As outlined in the guidance, the policy should include:

- a general statement of the policy
- who is responsible for what (delegation of tasks)
- arrangements for risk assessments and the practical control measures to reduce risk
- how the school will establish, monitor and review its measures to meet satisfactory health and safety standards

The policy should be proportionate and relevant to the school. The elected competent person in the school should work with the employer and its health and safety advisers to create the policy.

The following list gives examples that schools could include their health and safety policy. This list is not exhaustive and the content of the policy will be determined by the school:

- line management responsibilities
- arrangements for periodic site inspections
- arrangements for consulting and involving employees
- staff health and safety training, including assessment of risk (<http://www.hse.gov.uk/risk/controlling-risks.htm>)
- recording and reporting accidents to staff, pupils and visitors - including Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013 (RIDDOR) (<http://www.hse.gov.uk/riddor/>)
- policy and procedures for off-site visits (<https://www.gov.uk/government/publications/health-and-safety-on-educational-visits>), including residential visits and any school-led adventure activities
- dealing with health and safety emergencies (<http://www.hse.gov.uk/toolbox/managing/emergency.htm>), including procedures and contacts
- first aid for staff and pupils (<http://www.hse.gov.uk/firstaid/index.htm>)
- occupational health services
- how you will investigate accidents and incidents to understand causes

- how you will monitor and report performance and effectiveness of the health and safety policy

4. Assessing and managing risks

Risk assessments identify measures to control risks during school activities. Health and safety law requires the school to assess risks and put in place proportionate control measures. The law also requires it to record details of risk assessments, the measures taken to reduce these risks and expected outcomes.

Schools need to record significant findings of the assessment by identifying:

- the hazards
- how people might be harmed by them
- what they have in place to control risk

Records of the assessment should be simple and focused on controls. Outcomes should explain to others what they are required to do and help staff with planning and monitoring.

Risk assessments consider what measures you need to protect the health and safety of all:

- staff
- pupils
- visitors
- contractors

Schools will need to think about the risks that may arise in the course of the school day. This could include anything related to the school premises or delivery of its curriculum, whether on or off site.

Factors included in risk assessments will vary between schools, although some will appear in most schools. [ti.S.E. provides guidance on the risk assessment process \(http://www.hse.gov.uk/risk/controlling-risks.htm\)](http://www.hse.gov.uk/risk/controlling-risks.htm).

Schools can adopt or modify the guidance below to suit their circumstances:

- [.ti.SE website: common hazards \(http://www.hse.gov.uk/services/education/index.htm\)](http://www.hse.gov.uk/services/education/index.htm)
- [.D.f.E guidance: Asbestos management in schools \(https://www.gov.uk/government/publications/asbestos-management-in-schools-2\)](https://www.gov.uk/government/publications/asbestos-management-in-schools-2)
- [.D.f.E guidance: Emergency planning and response \(https://www.gov.uk/emergencies-and-severe-weather-schools-and-early-years-settings\)](https://www.gov.uk/emergencies-and-severe-weather-schools-and-early-years-settings)
- [.C.IEAP..S.S. for science and design and technology \(http://www.cleapss.org.uk/\)](http://www.cleapss.org.uk/)
- [AS.E for science \(http://www.ase.org.uk/resources/health-and-safety-resources\)](http://www.ase.org.uk/resources/health-and-safety-resources)
- [The Design and Technology Association for design and technology \(https://www.data.org.uk/for-education/health-and-safety\)](https://www.data.org.uk/for-education/health-and-safety)
- [Association for Physical Education \(http://www.afpe.org.uk/physical-education/safe-practice-in-physical-education-school-sport-physical-activity-2016/\)](http://www.afpe.org.uk/physical-education/safe-practice-in-physical-education-school-sport-physical-activity-2016/)
- [Outdoor Education Advisers' Panel for school trips \(https://oeapng.info/guidance-documents/\)](https://oeapng.info/guidance-documents/)

5. Other areas and activities to consider

The list of guidance below provides sources of further help on health and safety related risks

- workplace safety for teachers, pupils and visitors (<http://www.hse.gov.uk/consult/condocs/risk-assessment/classroom.htm>) - checklist for classrooms
- work at height (<http://www.hse.gov.uk/work-at-height/index.htm>)
- slips and trips in educational establishments (<http://www.hse.gov.uk/services/education/slips-in-education.htm>)
- on-site vehicle movements (<http://www.hse.gov.uk/workplacetransport/sitelayout.htm>)
- managing asbestos in your school (<https://www.gov.uk/government/publications/asbestos-management-in-schools-2>)
- control of hazardous substances (<http://www.hse.gov.uk/cosHH/>)
- selecting and managing contractors (<http://www.hse.gov.uk/pubns/indg368.htm>)
- good estate management for schools (<https://www.gov.uk/guidance/good-estate-management-for-schools>)
- school building design and maintenance (<https://www.gov.uk/government/collections/school-building-design-and-maintenance>) (and where necessary examination and testing)
- manual handling (<http://www.hse.gov.uk/msd/manualhandling.htm>)
- managing work-related stress (<http://www.hse.gov.uk/stress/>)

6. School security and emergency preparation

All schools should have plans in place to enable them to manage and respond to incidents related to school security. DfE is consulting on guidance to help schools with school security procedures (<https://www.gov.uk/government/consultations/school-security-draft-guidance>).

Schools should also have procedures for controlling access and barring individuals from premises. Schools can decide whether to include this within their school security plan or deal with the issue when it arises in another plan or procedure.

The DfE recommends guidance on helping schools with accessing and barring of individuals from premises.

Health and safety emergency procedures schools should consider include:

- serious injury to a pupil or member of staff (for example, transport accident)
- significant damage to school property (for example, fire)
- criminal activity (for example, bomb threat)
- severe weather (for example, flooding)
- public health incidents (for example, flu pandemic)
- the effects of a disaster in the local community

OfE provides emergency and planning response templates and guidance (<https://www.gov.uk/guidance/emergencies-and-severe-weather-schools-and-early-years-settings>).

7. Additional powers of local authorities as employers

Under section 29(5) of the Education Act 2002, local authorities have powers to direct health and safety matters relating to school premises or school activities taking place elsewhere in the following types of school:

- community schools

- voluntary controlled schools
- community special schools
- maintained nursery schools
- pupil referral units

Local authorities should only use these powers when a school's health and safety arrangements are inadequate.

8. Staff training

Schools must ensure that staff receive information and training about health and safety. This includes:

- how to assess risks specific for their job
- how to meet their roles and responsibilities identified within the health and safety policy

They can do this in different ways depending on individual or specific need. For example, providing staff with written guidance may be appropriate in some cases, while attending a training course may be more appropriate for others.

Staff whose work involves a greater element of risk will need extra or specific training. The HSE risk management guidance (<http://www.hse.gov.uk/risk/index.htm>) provides information about when staff require specific training in, for example:

- using industrial machinery
- managing asbestos
- having responsibility for the storage and accountability for potentially hazardous materials in their buildings

Df also provide information about the safe storage and disposal of hazardous materials (<https://www.gov.uk/government/publications/storing-and-disposing-of-hazardous-chemicals-in-schools>).

9. Duties on employees

The law requires employees to:

- take reasonable care of their own health and safety and that of others who may be affected by what they do at work
- co-operate with their employers on health and safety matters
- do their work in accordance with training and instructions
- inform the employer of any work situation representing a serious and immediate danger, so that remedial action can be taken

Employees should follow health and safety procedures put in place by their employer.

Teachers and other staff in schools have a common law duty when in charge of pupils to take the same care of them as they would as a parent.

10. Recording and reporting injuries and accidents

Certain work-related injuries to a member of staff or a child must, by law, be recorded and reported.

The employer or proprietor is responsible for this, but staff may be asked to prepare the report. J::I.S.E explain when, how, where and when to report incidents in their education information sheet: incident reporting in schools (<http://www.hse.gov.uk/pubns/edis1.htm>).

11. Review and evaluation

All schools should regularly monitor and review their health and safety policies to ensure they are reducing risks. As part of this monitoring, schools should investigate incidents to ensure that:

- they are taking appropriate corrective action
- they are sharing learning
- necessary improvements are put in place

Schools should regularly (at least annually) consider how they measure their performance. They should set up an effective monitoring system, backed up with sensible performance measures.

Where there is a health and safety incident at the school, the competent person and others with health and safety responsibilities, should assess the effectiveness of the school's procedures and its response. They should make necessary changes to policies and procedures.

12. The Law

The Health and Safety at Work etc. Act 1974 (<http://www.legislation.gov.uk/ukpga/1974/37/contents>) determines British health and safety law. The Health and Safety Executive (.HS.E), with local authorities, enforce this Act.

The Management of Health and Safety at Work Regulations 1999 (<http://www.legislation.gov.uk/uksi/1999/3242/contents/made>) supports the Act.

Schools should make sure they are familiar with both of these documents.

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