



**Castle View Academy**  
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# **Educational Visits Policy**

Responsibility: Educational Visit Coordinator

Review Schedule: Annual

Reviewed: September 2025

Next Review: September 2026



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## **1. Scope**

- 1.1 This policy forms part of the health and safety arrangements detailed in the 'United Learning Group Health and Safety Management Policy'. It outlines the arrangements in place to achieve compliance with the duties contained within the Health and Safety at Work etc Act 1974.
- 1.2 It is applicable to all Castle View Academy staff involved with educational visits.

## **2. Implementation**

- 2.1 This policy is effective immediately.

## **3. Interpretation**

- 3.1 The following definitions apply to this policy:
  - OEAP – Outdoor Education Advisors Panel – the national body of educational visits advisors and who produce the National Guidance for Educational Visits, of which United Learning is a member.
  - OEAP NG – the National Guidance for educational visits produced by OEAP.
  - LOTC – Learning Outside the Classroom
  - LOTC Quality Badge – a national award operated by the Council for LOTC that recognises activity/event providers or venues that meet educational provision and safety requirements.
  - EVC – Educational Visits Coordinator



#### **4. Educational Visits**

- 4.1 This policy uses the OEAP definition for educational visits as being:
- Any occasion when a young person takes part in a structured and employee-led learning activity which is carried out beyond the boundary of the normal operational base, but excepting the following:
    - o Where establishments operate on a split site
    - o Work experience placements
    - o Physical education: only the journey to and from the venue is covered by national guidance. The activity supervision should be that required or recommended by specialist PE guidance, such as that provided by the employer and Association for Physical Education (AfPE).
- 4.2 The principles outlined in this policy and OEAP NG must be followed for all activities that meet the above definition.

#### **5. The Status of OEAP National Guidance**

- 5.1 OEAP National Guidance (OEAP NG) has been formally adopted by United Learning as the management system and this guidance is used by Castle View Academy in the management, delivery, and review of all educational visits.
- 5.2 OEAP NG starts from three basic principles:
- Well planned and facilitated opportunities to learn in the real world, away from the classroom, and to experience adventure, help to improve the lives of young people.
  - Delivering learning outside or off-site does not need to be more difficult than delivering it inside a classroom. Planning and management should, therefore, be practical, proportionate, and non-bureaucratic.
  - 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.
- 5.3 OEAP NG is comprehensive and extensive; there is no benefit to be derived from repeating its content in this policy. At Castle View Academy, the Principal, Educational Visits Coordinator, Visit Leaders and other relevant academy staff must familiarise themselves with OEAP NG content and keep themselves apprised of any developments or updates as relevant to their area of responsibility.
- 5.4 OEAP NG provides information on a broad range of topics relating to educational visits, however, this policy only highlights those key elements that relate to health and safety management. For example, there is also detailed guidance on making the case for educational visits, inclusion, and visit charging systems.

#### **6. Role of the Educational Visits Coordinator**

- 6.1 Castle View Academy's Educational Visits Coordinator (EVC) is Teresa Stray. The Senior Leadership Team (SLT) member responsible for Educational Visits is David Hale and these two members of staff work together to be the focus of good practice for Educational Visits in the Academy.
- 6.2 Castle View Academy's Outdoor Education Advisor is Hampshire Outdoors, part of the Hampshire Local Authority. The EVC seeks their guidance when appropriate.



- 6.2 An EVC's key functions are to:
- Be a champion for all aspects of educational visits and outdoor learning
  - Challenge colleagues across all curriculum areas to use educational visits and outdoor learning effectively in order to provide a wide range of outcomes for children and young people and contribute towards academy/establishment effectiveness
  - Support/oversee planning so that well considered and prepared arrangements can lead to well-managed, engaging, relevant, enjoyable and memorable educational visits/outdoor learning
  - Mentor leaders and aspirant leaders, supporting their ongoing development and training and sample monitor their activity to identify any further training needs
  - Ensure that planning complies with this Policy and OEAP NG requirements and that the arrangements are ready for approval within agreed timescales
  - Support the academy's Head and/or Governors in approval decisions so that all those with responsibility have the competency to fulfil their roles.
  - Ensure that every activity is evaluated against its aims for learning and development, that good practice is shared and any issues are followed up.
  - Keep the academy's Senior Leadership Team and Governors informed about the visits taking place and their contribution to education outcomes
- 6.4 The EVC has completed the Hampshire Outdoors EVC training course and will have this refreshed every three years. The EVC also attends the Hampshire Outdoors online termly update meetings.

## **7. Role of the Visit Leader**

- 7.1 The Visit Leader has overall responsibility for the learning, development and supervision of a visit's participants and the safety of all, including the rest of the leadership team.
- 7.2 A Visit Leader's key functions are to:
- Be competent to carry out the lead role for the specific activity
  - Be able to use the chosen environment or venue(s) to provide a wide range of learning or development outcomes
  - Liaise with the academy's Educational Visits Co-ordinator (EVC) to ensure that visits have clear aims and are planned to appropriately balance benefits and risks
  - Ensure that there is effective supervision
  - Take the lead on risk management
  - Define the roles and responsibilities of other leaders (and participants) to ensure effective supervision, appointing a deputy wherever possible
  - Ensure that child protection issues are addressed
  - Provide relevant information to other leaders including the aims and how they can contribute to achieving these, the location, the participants (age, health information, capabilities, special needs, safeguarding and behavioural issues)
  - Ensure that informed parental consent has been obtained as necessary



- Provide relevant information to parents and participants, and arrange pre-visit information meetings where appropriate
  - Make sure there is access to first aid at an appropriate level
  - Ensure that if the visit leadership team includes someone with a close relationship to a member of the group, this is managed to avoid any possible compromise of effective supervision
  - Ensure that all leaders and any third party providers have access to emergency contact and emergency procedure details
  - Evaluate all aspects, both during and after the event
  - Report any accidents, incidents or near misses
- 7.3 The academy ensures that all Visit Leaders are competent to carry out the role. In line with OEAP guidance, Visit Leaders have their competence reviewed by the Academy's Senior Leadership Team (SLT) for every trip, ensuring that they are competent to lead that group on that visit in that environment.
- 7.4 To support the competence of Visit Leaders, Castle View Academy hosted an Outdoor and Visit Leader Training day on 3/1/24. Additionally, the Head of PE undertook the Snowsport England Snowsports Course Organisers Course on 7/1/25. Visit Leader training needs are kept under review by the Academy's EVC and SLT and further training will be organised as necessary.
- 8. Educational Visits Management Plan**
- 8.1 Castle View Academy has developed its establishment visit policy to cover all topic areas in the OEAP NG guidance document 5.3b 'Writing an Establishment Policy for Outdoor Learning, Off-site visits, and Learning Outside the Classroom'.
- 8.2 Castle View Academy has a structured process to manage trips which all staff are aware of. All trip related documents are available in a dedicated Teams area.
- 9. Visit Planning and Management**
- 9.1 Risk management, in the context of outdoor learning and off-site visits, involves a risk-benefit assessment, as opposed to the standard risk assessment process used across health and safety. It is a two-stage process:
- The identification of the potential benefits to be gained from an activity, along with any risks to the health and safety of those involved.
  - The implementation of a plan to best realise these benefits, using professional judgement to ensure that the level of risk does not exceed that which can be justified by the benefits.
- 9.2 In carrying this out the following 'STAGER variables' should be considered in the planning, management, and delivery of visits:
- Staffing: who is needed/available? The plan must work within the limits of available staff numbers, abilities and experience.
  - Timing: when does the trip run? Will the trip run outside of academy hours? How are students expected to get home from the academy site?
  - Activities to be undertaken: what do you want the group to do and what is possible?



- Group characteristics: prior experience, abilities, behaviour and maturity, any specific or medical/dietary needs.
- Environment: indoors or out; a public space or restricted access; urban, rural or remote; quiet or crowded; within the establishment grounds, close to the establishment or at a distance; and the ease of communications between the group and base.
- Remoteness: does the trip run in an area where communication is difficult? How will students communicate with trip leaders?

**9.3 Educational Visits can be broadly divided into two categories:**

- Category 1 (Standard) - those visits that involve no more than an everyday level of risk and are covered by existing policies and procedures. Such visits should require minimal planning or preparation beyond what is needed to make best use of the learning opportunity. In an academy context, they are simply lessons in a 'different' classroom.
- Category 2 (Enhanced) – those visits requiring additional planning, and some level of specific risk assessment. A visit moves into this category because one or more aspects cannot be managed adequately by existing policies and procedures. This may be due to the distance from the academy, the nature of the planned activities, the environment or venue(s), the nature of the particular group, the need for specialist leader competencies, or any combination of these. For some visits this will involve detailed planning over an extended period of time. Further details on visit categories and the sort of planning required for each is available in OEAP NG document 1b Foundations.

**10. Visit Approval/Sign Off**

- 10.1 United Learning operates a fully delegated visit approval system. That is, the final decision on whether or not an educational visit has been adequately planned and arranged, and that sufficient contingency arrangements are in place, rests with the academy's Principal, possibly with the input of the academy's LGB, who must be satisfied that this policy and OEAP NG has been followed.
- 10.2 Castle View Academy has engaged the services of Hampshire Outdoors (part of the Hampshire Local Authority) to act as the Outdoor Education Advisor (OEA). Hampshire Outdoors assist with all aspects of educational visits and provide an extra layer of risk management via the EVOLVE system for more complex trips. Contact details can be found in section 21 of this document.

**11. Emergency Planning**

- 11.1 Castle View Academy considers emergency planning at the planning stage of each visit. OEAP NG is consulted, together with the advice of Hampshire Outdoors, when required.
- 11.2 In the event of a major incident occurring, the Visit Leader must immediately notify their Principal/Senior Leader who will have access to the United Learning emergency contact/ escalation procedure. In the first instance this requires that Principals notify their Education Director who will cascade information to all relevant parties as necessary.



**12. Post-Visit Review**

- 12.1 All educational visits should be subject to a post-visit review, the level of detail for which will vary depending on the complexity of the visit. Key questions that need to be answered for all visits are:
- What worked well?
  - What didn't work so well?
  - What lessons can be learned/what could we do differently going forward?
- 12.2 Castle View Academy's review process has been formulated with reference to the OEAP NG document 4.2c Reviewing.

**13. Monitoring**

- 13.1 As with any other element of health and safety management, Educational Visits should be including in the periodic local monitoring activities carried out as part of each schools proactive monitoring plan. Schools should evaluate their adherence to this Policy and OEAP NG, as well as the local management arrangements in place.

**14. Insurance Requirements**

- 14.1 Castle View Academy is a member of the Risk Protection Arrangement (RPA) through which it is covered for all educational visit anywhere in the world. The membership certificate is held in the Teams Planning Documents folder and the UL Hub.

**15. LOTC Quality Badge**

- 15.1 If an organisation possesses the LOTC Quality Badge schools can be assured that their operation has been verified against a nationally recognised level of safety and educational standards, therefore visit leaders do not need to carry out their own risk or quality assessments regarding the activities provided. Site familiarisation visits may still be of benefit. Hampshire Outdoors also offer advice regarding the suitability of any provider.

**16. Vetting and Disclosure and Barring Service (DBS) Checks**

- 16.1 For extensive guidance on the application of vetting and DBS checks, please refer to OEAP NG document 3.2g 'Vetting and Disclosure and Barring Service (DBS) Checks'.

**17. Visits Between United Learning Sites**

- 17.1 Sometimes, schools will arrange visits to other United Learning schools. For the avoidance of doubt, the travelling school(s) need to consider the setup, transport and supervision elements of the visit. It is the host school's responsibility to manage the remaining health and safety considerations on the day. In practice, this should be relatively straightforward where the travelling school(s) activities mirror those carried out routinely by the host school.





**18. Duke of Edinburgh (DofE) Award**

- 18.1 The national DofE organisation has no direct involvement in the delivery of DofE programmes, including expeditions. The DofE licenses other organisations to deliver its programmes, but it plays no role in ensuring the health and safety of participants on expeditions.
- 18.2 For the DofE programme, Castle View Academy ensures that the Educational Visits Management Plan details the arrangements that are in place to ensure the safe management and delivery of this programme and in particular, the competence of those persons managing and leading expeditions.
- 18.3 Further details on DofE considerations can be found in OEAP NG document 7b, 'Duke of Edinburgh Award Expeditions'.
- 18.4 Castle View Academy's DofE trips are placed onto the EVOLVE system for Hampshire Outdoors to agree the arrangements put in place.

**19. Further Information**

- 19.1 Due to OEAP NG being a 'living' document that is regularly updated, it is not hosted on the A-Z section of United Hub or in Castle View Academy's Teams area. Instead, it can be found at [OEAPng.info](https://oeapng.info)

**20. Summary of Requirements**

- 20.1. A local Educational Visits Management Plan outlining the process in place for local educational visits management, in line with the requirements of this Policy and OEAP NG.
- 20.2. EVCs to be OEAP trained, with refresher training provided every three years.
- 20.3. Visit Leaders to have their competence formally assessed and advised to be provided with OEAP training.
- 20.4. Schools running a DofE programme to ensure suitable considerations of safety and competence and detail this in the local Educational Visits Management Plan

**21. Local Management Arrangements**

At Castle View Academy the Educational Visits Management Plan can be located on Teams under the Trips and Visits section or by asking David Hale (Assistant Principal) or Teresa Stray (EVC).

Hampshire Outdoors contact details are:

- Telephone: 01962 876218
- Email: [outdoor.education@hants.gov.uk](mailto:outdoor.education@hants.gov.uk)
- The Educational Visits Manager is Ben Brittain-Dodd
- The Senior Advisor is Karen Andrews