



FOUNDATION FOR GROWTH

**WOOTTON PARK
ACADEMY TRUST**

'Ipsum quod faciendum est diutius'

Title	Outdoor Education Visits Policy
Year	2025/2026
Policy Reference	<ul style="list-style-type: none">- Plumsun Ltd.- Department for Education- Outdoor Education of Advisors for Outdoor Learning and Educational Visits (OEAP)- AP National Guidance- Health and Safety: on Educational Visits November 2018'
Staff Link	Educational Visits Coordinator
Trustee Link	Chair of Trustees
Date Approved by Trust Board	September 2025, updated January 2026
Review Date	September 2026

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Introduction

Statement of intent

Wootton Park Academy Trust believes that educational visits are a core element of learners' education and is committed to ensuring that opportunities for participation in good quality visits are maximised.

It is the trust and individual school's intention that all practicable steps will be taken to meet statutory requirements, recognised codes of practice and government guidance, OEAP National Guidance and Health and Safety Law in establishing a safe and healthy environment on educational visits (EVs).

The trust believes that participation in high quality visits by learners and staff will enhance development and wellbeing, promote positive interactions between learners and staff and will also improve overall performance and ethos.

The school will ensure that each visit is provided with sufficient resources to plan and conduct high quality educational visits and that staff will be provided with training and advice to organise and manage them safely. The school will also ensure that through their leadership, all staff will know they have a duty to take reasonable care to avoid injury to themselves and others, and to co-operate, to ensure statutory duties and obligations are fulfilled.

Policy scope

This policy applies to all educational visits, defined as learning activities, that take place beyond the school premises. It does not apply to:

- work experience, which has a separate policy and separate government advice;
- activities conducted outdoors but within the school boundaries, as the safety of these is managed under standard school policies and processes.

This policy is informed by DfE guidance - 'Health and Safety: on Educational Visits November 2018' and will be reviewed annually or after any changes of legislation or approved codes of practice. This policy is also informed by the Outdoor Advisers' Panel National Guidance, to which Educational Visit Coordinators (EVCs), Visit Leaders and others should refer, and HSE Guidance <https://www.hse.gov.uk/education/school-trips.htm> for school trips.

Educational Visit objectives

Every educational visit must have clear aims and objectives designed to support and enhance curriculum delivery. These should be set out in the Plumsun Portal, the external IT platform used by the school to record and manage and evidence decisions and educational visit data.

Remit

The Outdoor Education Advisers Panel (OEAP) National Guidance (NG) document "Basic Essentials MUST Read - Status and Remit" clarifies the range of employees whose work requires them to use the guidance. In summary, it applies to employees whose work involves any one of the following:

- direct supervision of all learners undertaking experiences beyond the boundary of their normal operational base;
- direct supervision of all learners undertaking experiences that fall within the remit of Learning Outside the Classroom;
- facilitating experiences for all learners undertaking experiences beyond the boundary of their normal operational base;
- deploying staff who will supervise or facilitate experiences of or for all learners undertaking experiences beyond the boundary of their normal operational base;

- Any activity that is deemed a higher risk due to the activity undertaken.

This applies regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

For a more expansive explanation of legal expectations, all users will refer to the OEAP NG document: “Underpinning Legal Framework”

<https://oeapng.info/downloads/legal-framework-and-employer-systems/>

1. Visits

Visits are defined as any activity that takes place on school sites that is deemed a higher risk due to the activity and any activity outside of the school, including programmes of study in other places, work experience activities. Visits can be one day activities or activities which include over-night stays (residential).

2.1 Type of Visits

Off-site / out-of-school activities are known by a variety of names, such as day trips, visits, outings, excursions and journeys. An on-site activity can also be deemed a visit, if it involves higher risk.

To ensure standard interpretations, the following definitions apply:

Day Visits:

All activities involving learners and staff which take place away from the school and **do not** involve an overnight stay.

Residential:

All activities involving learners and staff which takes place away from the school and **does** involve at least one overnight stay.

2. Provision of Employer Guidance

The School has formally adopted “OEAP National Guidance” as “School or Academy Trust Employer guidance”. This OEAP guidance can be found on the following web site:

<https://oeapng.info/about-national-guidance/>

It is a legal expectation that employees must work within the requirements of their employer’s guidance; therefore employees of the School must follow the requirements of “OEAP National Guidance”, and OEAP NG recommendations, as well as the requirements of this Policy Statement.

In the event of any apparent conflict between this employer’s policy, an establishment’s policy or OEAP National Guidance, your employer’s policy must be followed and clarification sought from the Educational Visits Coordinator (EVC) or management

Where a school employee commissions OEAP activity, they must ensure that such commissioned agent has either:

adopted School or OEAP National Guidance

or

have systems and procedures in place where the standards are not less than those required by OEAP National Guidance.

3.1 Scope and Remit

The OEAP National Guidance (NG) document “Basic Essentials MUST Read - Status and Remit” clarifies the range of employees whose work requires them to use the guidance. In summary, it applies to employees whose work involves any one of the following:

- direct supervision of young people undertaking experiences beyond the boundary of their normal operational base;
- direct supervision of young people undertaking experiences that fall within the remit of Learning Outside the Classroom;
- facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base;
- deploying staff who will supervise or facilitate experiences of or for young people undertaking experiences beyond the boundary of their normal operational base;

This applies regardless of whether the activities take place within or outside of normal working hours, including weekends and holiday periods.

For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the OEAP NG document: “Underpinning Legal Framework”

<https://oeapng.info/downloads/legal-framework-and-employer-systems/>

3. Clarification of Roles

The Health and Safety at Work etc. Act 1974 places overall responsibility for health and safety with the employer. Employers have duties to ensure, so far as is reasonably practicable, the health, safety and welfare of all employees and others who may be harmed by their activities.

OEAP National Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found in school management structures.

OEAP National Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found in school management structures. These are:

- Member of Board of Trustees
- Head of School
- Manager of an establishment other than a school
- EVC
- Visit or Activity Leader
- Assistant Visit leader
- Volunteer Adult Helper

- Those in a position of Parental Authority

OEAP National Guidance outlines the normal responsibilities of various roles, including those in the following documents:

- 3.4f “Member of a Management Board or Governing Body”;
- 3.4g “Headteacher/Manager”;
- 3.4j “Educational Visits Co-ordinator (EVC)”;
- 3.4k “Visit or Activity Leader”

The Senior Leadership Team (SLT)

- Regularly discuss the place of off-site visits and outdoor learning in relation to ethos, aims, programmes and effectiveness
- Understand the responsibilities for visits, including particular responsibilities as the employer of staff
- That the school has an up-to-date policy for educational visits, which includes a policy for charging for visits and activities
- Ensures staff have access to training and to develop their understanding of visits and associated guidance
- That they support the EVC, visit leaders to provide safe, high-quality visit
- That there is an Educational Visits Co-ordinator (EVC) in place who meets employer requirements
- That there are arrangements in place to consider adjustments for learners with special needs, including medical and behavioural needs, so that visits are inclusive
- That visits are included in agendas as a standing item in SLT management reports.

The Head of School

The Head of School (Primary) is responsible for ensuring all visits comply with employer and establishment policies. The Head of School (Primary) can also perform the Educational Visits Co-ordinator (EVC) role.

Refer to: NG 3.4g Manager/ Head of School or Equivalent

The Educational Visits Co-ordinator (EVC)

Support the Senior Leadership Team in ensuring that the establishment fulfils its duty of care and complies with legal requirements regarding outdoor learning and off-site visits. Visits are notified or submitted to the Educational Visits Co-ordinator (EVC) for formal approval.

The person appointed as EVC must be specifically competent for that role, and able to carry out all the functions listed in 3.4j “Educational Visit Co-ordinator (EVC). The role is not just administrative, although certain tasks may be delegated to an administrator. They should be an experienced visit leader with sufficient status within the establishment to guide the working practice of colleagues leading visits.

Where the EVC does not meet these criteria, they will require structured access to and support from a designated person who fits the recommended criteria and who will fulfil those aspects not covered by the post holder.

All EVCs should undertake EVC Training, followed by revalidation training at least every three years, delivered by a trained OEAP EVC trainer.

The EVC will have access to expert advice provided by the employer from competent Outdoor Education Adviser(s) (Plumsun Ltd).

Refer to: 3.4j Educational Visits Co-ordinator (EVC)

Visit Leader

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.

The Visit Leader and all other accompanying staff responsible for a group of learners have a Duty of Care for the duration of the Off-Site Visits and/or Residential and must comply with their employer's policy and guidance.

Employers must ensure that leaders are specifically competent for the type of visit and activities they plan to lead, and are approved to do so. **See NG 3.2d Approval of Leaders**

Other staff attending the Visit

Staff must take all reasonable care to ensure that every learner under their control is protected from unacceptable risks.

All staff accompanying a learner visit are expected to be aware of their responsibilities under this Policy and the school's Child Protection and Safeguarding Policy.

Outdoor Education Adviser (Plumsun Ltd)

The responsibilities in the adviser;

- Advising about compliance with relevant legal requirements – see OEAP National Guidance document 3.2a “Underpinning Legal Framework”
- Interpreting, refining and presenting national guidance at a local level
- Advising SLT about the appointment of EVCs, and supporting the induction of newly appointed EVCs
- Providing advice and support to those involved in outdoor learning and off-site visits
- Monitoring the work of EVCs and supporting establishments to ensure that their EVCs' training needs are identified and met
- Providing advice on appropriate leader competence for all types of outdoor learning and off-site visits, and ensuring that this is appropriately assessed
- Providing advice on safeguarding during outdoor learning and off-site visits, including about requirements for Disclosure and Barring Service checks
- Engaging actively with appropriate networks and organisations, so as to have access to advice about areas in which they are not personally knowledgeable
- Maintaining and sharing knowledge of national requirements and initiatives, and of national schemes such as the Learning Outside the Classroom Quality Badge, national governing body accreditation schemes and AALA licensing
- Implementing effective and proportionate policies and procedures for the notification and approval of outdoor learning activities and off-site visits
- Approving (or disallowing) plans for activities and visits on behalf of the employer, where this has not been delegated to establishment level
- Monitoring the provision of outdoor learning and off-site visits, including whether risks are appropriately assessed and managed – see OEAP National Guidance document 3.2b “Monitoring”
- Reviewing policies and procedures in the light of lessons learned, and sharing good practice widely
- Contributing to the investigation of serious accidents and incidents

Staff who have gained competence from attending visits, will be assessed for their ability to lead a visit. Members of staff who are competent visit leaders will be assessed for their ability to become Educational Visit Co-ordinators.

5. Procedural Requirements

This establishment policy explains specific procedural requirements, including those relating to: Risk management (see below);

- Coronavirus (see OEAP National Guidance document 4.4k “Coronavirus”);
- Approval of staff to lead activities and visits (see OEAP National Guidance document 3.2d “Approval of Leaders”);
- Evaluation of external providers (see below);
- Parental communication and consent (see OEAP National Guidance document 4.3d “Parental Consent and Informing Parents”);
- Participant information and data protection (see below);
- Prior notification and approval of visit plans;
- Any types of visit that should be approved only after consultation with an external adviser;
- ‘Checking out’ and ‘checking in’ before, during and after a visit;
- Emergencies (see below);
- Monitoring (see below);
- Evaluation (see OEAP National Guidance document 5.1d “Evaluation”).

Monitoring; Approval and Notification of Visits

As an employer, the school ensures that there is sample monitoring of the visits and activities undertaken by its staff and learners, either by attaching such monitoring duties to its officers, or by delegating these tasks to an external advisor. Such monitoring should be in keeping with the recommendations of OEAP National Guidance. There is a clear expectation that the monitoring function is a delegated task, principally carried out through systems put in place by the establishment EVC.

See OEAP National Guidance document 3.2b “Monitoring”

Employer guidance must provide clarity on issues where responsibilities and functions are delegated. This is particularly critical in establishing requirements regarding formal notification and formal approval of activities.

The school uses the Plumsun online system for notifications and approvals. A key feature of this system is that visits and activities requiring approval are automatically brought to the attention of the Advisor. Those visits and activities not requiring the approval of the Advisor may be uploaded to the system (category A and B) these visits may be viewed, sampled or monitored using the database facilities of the system.

6. Induction, Training, Apprenticeship, Succession Plan

As an employer, the school is required to ensure that its employees are provided with

- appropriate guidance relating to visits and learning outside the classroom activity;
- employer-led training courses to support the guidance to ensure that it is understood;
- suitable systems and processes to ensure that those trained are kept updated;
- access to advice, support and further training from appointed Advisers that have proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

The appropriate guidance for the management of learning outside the classroom in the school is the OEAP National Guidance web site.

Training courses validated by the Outdoor Education Advisors Panel should be provided to all employees leading a visit and the school should have access to a competent member of staff who has completed the appropriate accredited course.

e.g. The relevant training courses

- Educational Visit Coordinator (EVC) Training
- Educational Visit Coordinator (EVC) Revalidation
- Visit Leader Training
- Management of an Offsite Visit Emergency (MoVE)

For the purposes of day-to-day updating of information, The School EVCs and Visit / Activity Leaders will use the news items posted on the Plumsun website: www.plumsun.com

Where an employee experiences problems with finding the material they are looking for, or require clarification or further help and guidance, they should contact their establishment's Educational Visits Coordinator (EVC), or the Plumsun Adviser, nominated by their employer.

OEAP Employer Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of the School Policy that all the School leaders and their assistants have been formally assessed as competent to undertake such responsibilities as they have been assigned in line with the OEAP guidance.

Refer to OEAP NG document: "Assessment of Competence"

7. Risk Management and Risk-Benefit Assessment

As an employer, the school has a legal duty to ensure that risks are managed - requiring them to be reduced to an "acceptable" or "tolerable" level - and not to eliminate risks, as would be a reasonable expectation when risk assessing a piece of machinery, workshop or manufacturing process. The school requires that proportional (suitable and sufficient) risk management systems are in place, undertaking to provide such support, training and resources to its employees as is necessary to implement this policy.

The risk management of an activity should be informed by the benefits to be gained from participating. The school strongly recommends a "Risk-Benefit Assessment" approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. This appreciation of the benefits to be gained through participating provides objectivity to a decision that any residual risk (i.e. the risk remaining after control measures have been put in place) is "acceptable". HSE endorse this approach

through their “*Principles of Sensible Risk Management*” and advocate that it is important that young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

There is no legal or requirement to produce a risk assessment in a particular format; but there is a legal requirement for the process to be recorded and for suitable and sufficient control measures to be identified for any significant risks i.e. those that may cause serious harm to an individual, or harm several people. However, Plumsun ensures the school is supplied with an electronic portfolio of exemplar generic risk-benefit assessments, as well as exemplar event-specific assessments.

These risk management materials can also be accessed through the following web link:

www.plumsun.com

The school may adopt and adapt these materials to ease the burden of bureaucracy that might otherwise discourage leaders from making full use of OEAP learning opportunities.

Refer to OEAP NG document: “*Risk Management*”

8. Assessing Venues and Providers

All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third-party provision will meet group expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people. It is a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. Establishment policy should clarify the circumstances where a preliminary visit is a requirement.

It is good practice for Visit Leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available, thus reducing bureaucracy.

Examples of such schemes include:

- The LOtC Quality Badge
- AALS licensing
- Adventure mark
- NGB centre approval schemes (applicable where the provision is a single, specialist activity).

Advice from the Education Visits Adviser Plumsun must be sought for a high-risk activity visit or residential.

9. Volunteers

Depending upon an employer’s policies, a volunteer may take any role in a visit, including Visit Leader, Activity Leader, Assistant Leader and Helper. Indeed, some organisations, such as charities, rely largely on volunteers to carry out these roles.

For definitions of these roles, and details about their responsibilities, see the following OEAP National Guidance documents:

- 1a “Glossary and Definitions”
- 3.4c “Visit or Activity Leader”
- 3.4L “Assistant Leader”
- 3.4m “Helper”.

Examples of how volunteers might be involved with visits include:
a school asks a PCCAB/trustee to join the Visit Leadership Team to help with supervision;

- a parent helps with supervision;
- a member of the community who is an activity specialist leads an activity, or an entire visit – for example, a member of a local orienteering club offers to run a school orienteering club and take groups to weekend events;

It is essential that volunteers meet the requirements of the roles that they are assigned (Visit Leader, Activity Leader, Assistant Leader, Helper). The engagement of any volunteer must involve an appropriate level of vetting and induction. They must be sufficiently competent and confident to carry out their responsibilities. The level of competence and the thoroughness of the engagement process depend upon the role that the volunteer is to take, and the degree to which they will be working independently or under supervision.

Where they are working independently it should be to the same standard as would be expected of an employee or contractor taking on the role. See OEAP National Guidance document 3.2d “Approval of Leaders”.

10. Emergency Planning and Critical Incident Support

10.1 First Aid

The Health & Safety (First Aid) Regulations 1981 state: “An employer shall provide or ensure that there are provided, such equipment and facilities as are adequate and appropriate in the circumstances for enabling first aid to be rendered to their employees if they are injured or become ill at work”. This also applies to the children and young people in the care of an establishment. The provision of first aid during off-site visits and activities should therefore be considered as part of the risk-benefit assessment and planning process.

It is also a legal requirement that all public service vehicles, including minibuses, must carry a first aid kit.

Visit Leaders will have in place an assessment to determine their first aid provision;

- The determination of the appropriate requirements should consider:
- The nature of the activity;
- The nature of the group;
- The likely injuries associated with the activity;
- The extent to which the group will be isolated from the support of the emergency services (both in terms of distance and response time).

10.2 Critical Incident Response

A critical incident is an incident where any member of a group undertaking an off-site activity has:

- either suffered a life-threatening injury or fatality;
- is at serious risk;
- or has gone missing for a significant and unacceptable period.

Refer to NG document: “*Critical Incident Management for Visits*”

To activate support the following telephone numbers should be used:

Plumsun office hours: 0845 8622684

Plumsun outside normal office hours: 07885 909761 & 07885 647345

Plumsun will be the critical incident responder for the school.

The Visit Leader and staff on the visits must be aware of the emergency process and who to contact. Emergency numbers will be uploaded on the Plumsun Visit Form and are visit specific.

Contact numbers should be carried by leaders at all times during an off-site activity but should only be used in the case of a genuine emergency. Under no circumstances should these numbers be given to young people

or to their parents or guardians. The Plumsun APP may be used, which states what to do in an emergency and provides a text alert with a location.

As an employer, the school is committed to providing emergency planning procedures to support establishments in the event of a critical incident.

Injuries which occur during a one-day visit or residential trip must, on return to the school, be reported in exactly the same way as those which occur on the school premises. Notes will need to be made at the time of the incident so that it can be accurately reported later.

Refer to LOtC NG document: “*Critical Incident Management for Visits*”

11. Behaviour

All learners must agree to the Learner Code of Conduct prior to the learner attending the trip. Details outlined below:

Code of Conduct

All learners are required to abide by this Code of Conduct and must:

- Show respect for others and uphold the School’s Equality and Diversity Policy
- Be polite and behave in a manner which will not cause offence to others
- Show respect for property and possessions of others
- Uphold the good reputation of the school throughout the duration of the visit

The school will **not tolerate** the following and may result in a learner being sent home at the parents’ expense (this list is not exhaustive):

- Threatening or abusive behaviour, whether verbal or physical
- Acts of vandalism
- Swearing, spitting and the use of obscenities (swearing) which is offensive to others
- Loud or aggressive behaviour
- Offensive chanting or songs about learners or staff on the visit at any time
- Any activity which is likely to bring the school’s name into disrepute
- Learners engaged in criminal activity (the learner will be dealt with in accordance with local police)
- Consuming of alcohol
- Learners with illegal substances will be subject to the School’s Behaviour Policy on return to the school.
- Any damage to vehicles (any learner responsible will be liable for the repair costs and may be excluded from the school).

Residential Specific:

- Return to their rooms each evening by the agreed times set by staff on the trip
- Follow health and safety and evacuation procedures in the hotel or accommodation
- Any damage to the hotel (any learner responsible will be liable for the repair costs and may be excluded from the school)
- Follow all additional instructions for activities including those outside of programmed time.

Learner Behaviour

All accompanying staff are responsible for the behaviour of learners whilst on the visit **at all** times. A rota system can allow staff breaks, however supervision (including remote supervision) must be covered.

Bullying and Harassment

All accompanying staff must be vigilant to any acts of bullying and/or harassment by learners towards other learners whilst on the visit and must ensure that they take appropriate action at the time.

Unacceptable behaviour by staff or learners will be followed up upon return to the school using the Anti-bullying Policy.

12. Inclusion

Every effort should be made to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender or religion. If a visit needs to cater for young people with special needs, every reasonable effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

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

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

Employers, Heads/Managers, Curriculum Planners, EVCs and Visit Leaders should be aware of the extent to which Inclusion is or is not a legal issue.

Under the Equalities Act 2010, it is unlawful to:

- treat a young person less favourably on the grounds of their disability, special educational needs, medical needs, ethnic origin, gender or religion.
- fail to take reasonable steps to ensure that such persons are not placed at a substantial disadvantage without justification.

Refer to OEAP NG document: “Inclusion as a Legal Issue”

13. Insurance for Off-site Activities and Visits

Employer’s Liability Insurance is a statutory requirement, and the school holds a policy that indemnifies it against all claims for compensation for bodily injury suffered by any person employed by it. This cover should extend to those persons who are acting in a voluntary capacity as assistant supervisors. The school also holds Public Liability insurance, indemnifying it against all claims for compensation for bodily injury from persons not in its employment, as well as for the accidental loss of, or damage caused to, property. Employees (as agents of the employer) are indemnified against all such claims, as are voluntary helpers acting under the direction of the employer’s staff. The indemnity covers activities such as off-site activities and visits organised by all establishments and settings for which the employer is responsible.

The School Visit and Activity leaders should contact the School Insurance Provider to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the insurer. They should also ensure they have obtained current information regarding any special policies that may be available to offer more comprehensive cover.

Refer to OEAP NG document: “Insurance”

14. Finance; Charges for Off-site Activities and Visits

The School Heads/Managers, Curriculum Planners, EVCs and Visit/Activity Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996.

Refer to OEAP NG document: *Charges for Off-site Activities and Visits in an Educational Establishment*

15. Data Protection

Information about staff and participants, including recognisable photographs, is subject to data protection law. See OEAP National Guidance document 4.4j “Participant Information and Data Protection”.

It is vital for the health and safety of those involved in visits that relevant information is available to leaders and external providers for planning activities, and in the event of an emergency. Your establishment policies should allow appropriate sharing of personal data for visits and set out procedures for handling it.

Plumsun provides an APP, which can be used to access all visit information.

16. Property

The visit should cover arrangements for participants’ and staff property, including:

- The responsibilities of participants and leaders for their own property;
- The need for leaders to ensure there is adequate security for property – for example, for valuables during a residential visit, or if participants are required to hand over or leave behind certain items during an activity;
- The extent and limitations of the establishment’s responsibilities and liabilities for such property;
- Details of any relevant insurance cover, and its limitations

Refer to school insurance documents.

17. Vetting and DBS Checks

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

For the purposes of this guidance:

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

The placement of an adult within a situation of professional trust (where young people could be vulnerable to physical or mental exploitation or grooming) should always be risk assessed.

Refer to OEAP National Guidance: “Vetting and CRB Checks”

18. Requirement to Ensure Effective Supervision

In general terms, the Law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is “effective”.

There is no absolute requirement for a mixed-sex group to be supervised by a mixed-sex leadership team. However, if this is not to be the case then there should be arrangements in place to manage foreseeable issues.

Effective supervision should be determined by proper consideration of:

- age (including the developmental age) of the group;
- gender issues;
- ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics etc);
- nature and location of the activity (including the type of activity, duration, skill levels involved, as well as the time of year and prevailing conditions,
- staff competence.

However, as an exception to the above, Ofsted and DfE guidance prescribe ratios for Early Years.

Refer to OEAP NG document: ["Ratios and Effective Supervision"](#)

Refer to OEAP National Guidance: ["Group Management and Supervision"](#)

Supervision Ratios

In general terms, the Law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is “effective”.

The supervision ratios outlined within this policy are for guidance purposes and may vary depending on the nature of the trip, the needs of the group, and the findings of the risk assessment. Ratios set out in the *DfE Guidance on Health and Safety on Educational Visits* provide a useful benchmark, but the final ratio for each visit will be determined in line with the specific activity, while always adhering to statutory requirements. For Early Years Foundation Stage (EYFS), statutory ratios as set out in the relevant guidance will always be followed without variation.

18.1 Recommended Ratios for Educational Visits

The following ratios are provided as a guide and should be adapted as necessary:

- **Early Years Foundation Stage (EYFS):** Statutory requirements must be followed at all times.
- **Key Stage 1 (Years 1–2):** 1 adult to 6 learners
- **Key Stage 2 (Years 3–6):** 1 adult to 10–15 learners
- **Secondary (Years 7+):** 1 adult to 15–20 learners
- **Residential visits / adventurous activities:** Ratios to be determined by risk assessment and provider requirements.

These ratios are intended as guidance only. Leaders must consider the age, ability, behaviour, and specific needs of the group, the nature of the activities, and the environment in which the visit is taking place.

At least one person who has a current paediatric first aid certificate must accompany EYFS learners on outings

19. Transport

Careful thought must be given to planning transport to support off-site activities and visits. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it and establishments must follow the specialist guidance provided in the school transport policy. All national and local regulatory requirements must be followed.

The level of supervision necessary should be considered as part of the risk management process when planning the journey, considering issues of driver-distraction when considering what supervision is required for the specific group of passengers being transported in a minibus.

The Visit Leader should ensure that vehicles are hired from a reputable company.

Transporting young people in private cars requires careful consideration and must follow the school's Child Protection and Safeguarding Policy. Where this occurs, there should be recorded procedures. Seek the Outdoor Education Advisers advice.

Refer to OEAP NG Documents:

- 4.5a Transport General Considerations
- 4.5b Transport in Minibuses
- 4.5c Transport in Private Cars
- 4.5d Seat Belts and Child Restraints
- 4.5e Hiring a Coach
- 4.5f Checklist - Assessing a Coach Hire Provider
- 7.1r Overseas Visits
- 8.1s Coach or Minibus Provider Statement

20. Planning

Planning should reflect the consideration of legal and good practice requirements, ensuring:

- The plan is based on establishment procedures and employer guidance.
- All staff (including any adult volunteer helpers) and the young people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk management process.
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained.
- Proportionate assurances have been obtained from any providers (making full use of national schemes that accredit that assurances have already been obtained by credible inspection regimes).
- Designated emergency contact(s) have been identified that will work on a 24/7 basis where required.
- All details of the activity provision are accessible to the emergency contact throughout the period of the activity.
- Trip mobile phones will be taken on all non-PE trips by the visit leader along with the first aid kit that includes the emergency Plumsun phone numbers card.

The Assistant Principal, Adam Cowdell, is the designated Educational Visits Coordinator (EVC) and has received the appropriate training. Approval of trips will depend on the category (See *section 20.1 for categories*):

- **Category A Trips:**
The EVC will review and approve all Category A trips. For physical education trips within Category A, approval will be given either by the EVC or the Assistant Principal, Adam Cowdell.
- **Category B Trips:**
After EVC approval, final sign-off for Category B trips will be provided by the Head of Primary Phase, Jane Page.
- **Category C Trips:**
All Category C trips must be submitted to Plumsun for review and final approval.

Before a visit is advertised to parents/carers, the EVC will approve the initial plan (Appendix 1). Once this has been authorised the EVC will support the member of staff in completing the planned event. The EVC will also approve the completed plan and risk assessments for the visit before departure. This will be undertaken using Plumsun as the planning and approval system.

We recognise that staff competence is the single most important factor in the safe management of visits, and so we support staff in developing their competence in the following ways:

- An apprenticeship system, where staff new to visits assist and work alongside experienced visit leaders before taking on a leadership role.
- Supervision by senior staff on some educational visits.
- Support for staff to attend training courses relevant to their role, where necessary.
- In deciding whether a member of staff is competent to be a visit leader, the EVC Leader/Head of School will consider the following factors:
 - Relevant experience.
 - Previous relevant training.
 - The prospective leader's ability to make dynamic risk management judgements, and take charge in the event of an emergency.
 - Knowledge of the learners, the venue, and the activities to be undertaken.
- Wootton Park School values and recognises the contribution of volunteer adults and parent/carer helpers assisting with offsite activities and visits. Volunteers will be approved by the EVC and Visit Leader and they will be carefully briefed on the scope of their responsibility. Any volunteers who accompany a visit or activity will be directly supervised by a member of staff. If they are to have significant unsupervised access to young people then an enhanced DBS disclosure will be obtained and they will undergo induction and training in their role and responsibilities.

It is strongly recommended that at a very early stage of the planning process, the provisional staffing team carry out a planning exercise to identify the benefits and learning outcomes that the activity (or range of activities) might achieve. If the outcomes are to be evaluated with any rigor (an Ofsted expectation), then it will be essential that these outcomes are prioritised, and appropriately targeted. A record of these outcomes will help keep the plan focussed and be a vital part of the risk management process in providing some objectivity in a "Risk Benefit Analysis". Once the targeted outcomes have been recorded, it will then be possible to identify appropriate on-going review and evaluation strategies, including indicators.

To reduce bureaucracy and encourage activity, the school takes account of the legalities regarding a requirement for formal consent. When an activity is part of a planned curriculum in normal curriculum time and no parental contributions are requested, then a formal consent is not necessary. However, in the interests of good relations between the establishment and the home, it is good practice to ensure that those in a position of parental responsibility are fully informed.

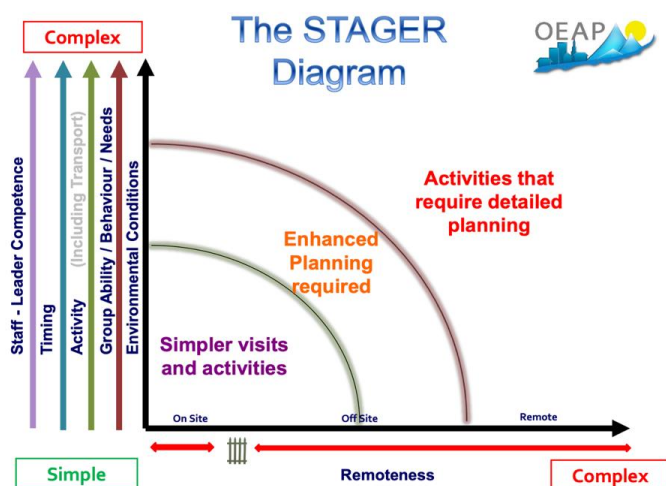
This supports the move towards developing activity-specific policies at establishment level for regular or routine activities. Such policies should be robust and equate to "operational guidance" that makes it clear how the activity should be planned and delivered, meeting all necessary recommendations and requirements, as well as assuring educational quality.

20.1 Category of Visits

The degree of complexity of a particular plan or policy (along with its supporting procedures) will need to reflect the nature and complexity of several variables that can impact on any given activity. These variables can be remembered as "**STAGER**" as explained below.

- Staffing requirements – trained? experienced? competent? ratios?
- Activity characteristics – specialist? insurance issues? licensable?
- Group characteristics – prior experience? ability? behaviour? special and medical needs?
- Environmental conditions – like last time? impact of weather? water levels?
- Remote/ distance from support mechanisms in place at the home base – transport? residential?

Refer to NG document: Planning Basics
Please refer to the NG: 1b Foundations



Category A

PRESENT NO SIGNIFICANT RISKS

- Includes visits for which the risk is similar to that encountered in daily life
- No NGB Awards necessary but EVC to assess leaders as competent

Category B

HIGHER RISK ACTIVITIES

- Which may require that the leader has undergone additional familiarisation or induction
- Require more detailed planning
- A leadership qualification may be relevant
- Leader approved by EVC

Category C

THE MOST DEMANDING

Must have employer approval and endorsement from an Outdoor Education Adviser

- Any activity in, on or using water – where there is potential for drowning
- International visits – includes the Isle of Wight
- Residentials – all overnight stays
- All Outdoor and Adventurous Activities
- Led by NVQ 3 or NGB Award Assessed staff

20.2 The Plumsun Portal

The Visit Leader must upload their visit to the Plumsun Portal. The Plumsun Portal will automatically calculate the Category from the Visit Leaders selection of Visit Type and Activities. However, as the visit category is assessed by several factors, then the category can be changed manually.

21. Specific Arrangements

21.1 General

- **Delegation:** The Visit Leader does not have to deal with all the administrative arrangements for the Off-Site Activity or Residential Trip personally but they retain overall responsibility, and it is important to remember this when allocating tasks to others. The Visit Leader must upload the visit onto the Plumsun Portal, as this is the audit trail of the Visit Leaders responsibility.
- **Risk Assessments:** It is the Visit Leader's responsibility to ensure the appropriate Risk Assessments have been carried out for the trip, within the guidelines of this Policy and to ensure that all staff accompanying the trip have read and understood it.

- **School Policies:** Staff accompanying an off-site visit or residential trip must have read and understood this policy.
- All visits categorised as B and C must be reviewed by the EVC.
- **Approval:** At the pre-planning stage outline approval from the EVC must be secured. Prior to departure final approval must be given by the Educational Visit Co-ordinator or the Education Visit Adviser (depending on the category of visit)
- Plumsun Outdoor Education Visits Advisers must mandatorily review and endorse high risk visits (Category C Visits on the Plumsun Portal), before the visit can commence.
- Plumsun Outdoor Education Visits Advisers will request other visits to be submitted for review as necessary.
- **Preliminary Visits:** Whenever reasonably practicable a preliminary visit should be arranged by the Visit Leader, or the external company involved in the activity.

21.2 Financial Arrangements

- The Visit Leader is responsible for providing a budget for the trip and should request quotes from the approved travel provider and any other provider of accommodation or activities. This planning element includes the booking of actuals, reference numbers, and adjustment to number of attendees.
- If insufficient funds are collected to cover the costs, the visit may have to be cancelled.

21.3 Expenses

- All anticipated expenses should be agreed prior to the time of travel.
- Any unexpected expenses will be considered upon return. The Visit Leader and staff must ensure all receipts are kept and the Visit Leader should contact the Head of School upon return to approve the additional expenditure.

21.4 Losses / Damage

- **Lost Learner or Learners:** After the final return time to the hotel or agreed rendezvous it is reasonable to contact the police if the Visit Leader cannot contact the learner or learners by mobile phone.
- **Lost Luggage/Money etc:** Replacement of clothes, money etc. can be solved temporarily by loan of money by staff and this can be reclaimed on return to the school.
- **Damage Caused by Learners:** The school will pay for the damage if compensation is required immediately. The school will fund this initially and bill the learner(s) afterwards if responsibility can be established. Any incidents will be dealt with immediately upon return to the school under the School's Behaviour Policy.
- **Staff Sickness:** On a residential trip the minimum staff/learner ratio should be maintained at all times even if staff become unwell or have to leave suddenly for any reason, unless this has been accounted for in the calculation of ratios before the visit. A member of staff should be requested from the school to join the group as soon as possible in these circumstances.

21.5 Travel arrangements

Travel risks should be included in the Off-Site Risk Assessment document which is completed by the Visit Leader and signed by accompanying staff at least one week before the trip departs.

21.6 Learner Medical Arrangements

- **Drugs and medicines** must not be administered by staff unless supported by written parental permission. Ask parents to make sure that medicines are labelled showing the learner's name and details of dosage.
- **Medical records:** A record of medication or first aid administered should be kept by the member of staff involved.
- **Medical Information:** Copies of the written parental permission for residential visit must be taken on the trip by the Visit Leader.
Learners medical conditions should have person specific risk assessments.

- **DSS form EHIC or UK GHIC** must be completed by parents for every learner on a European visit. See <https://www.nhs.uk/using-the-nhs/healthcare-abroad/apply-for-a-free-uk-global-health-insurance-card-ghic/>

21.7 Consumption of Alcohol, Smoking and Drugs

Alcohol

The trusts position is that alcohol should not be consumed during any visit.

Smoking and Vaping

The trusts position is that smoking and vaping is prohibited during any visit.

Volatile Substance Abuse, Legal Highs and Illegal Drug Use

There will be no use of any of these substances and this should be clear to all visit leaders, participants and helpers before departure.

22. Adventure Activities Licensing Regulations

Hazardous activities can be defined as trips which include (but are not restricted to) abseiling, archery, assault courses, canoeing, caving, go-carting, hill walking, horse riding, martial arts, mountaineering, outward bound activities, orienteering, rock climbing, rowing, sailing, swimming outdoors (i.e. in sea, lakes, rivers), sub aqua, trampolining, water sports, weight training with free weights, winter sports (i.e. skating, dry ski slope or skiing), and field trips, especially in dangerous locations (i.e. moors, hills, quarries, lakes or sea shore). This will include Duke of Edinburgh Scheme, or similar expeditions.

Employers, Heads/Managers, EVCs and Leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated.

The Activity Centres (Young Persons' Safety) Act 1995 requires anyone who provides certain adventure activities to young people under the age of 18 in return for payment to have a licence and abide by its conditions, unless specifically exempted. The Adventure Activity Licensing Regulations 2004 give full details about the providers and activities in scope of the licensing scheme.

The licensing scheme is operated by the Adventure Activities Licensing Authority (AALA). The Health and Safety Executive is currently designated as the AALA. The Adventure Activities Licence is an assurance that a provider meets safety standards, but only for the specific activities it covers. There are many adventure activities that it does not cover, and it does not accredit educational or activity quality. If you are selecting a provider of adventure activities, you should refer to the advice in OEAP NG document 4.4g "Selecting External Providers and Facilities"

The intention of the regulations is to provide a regulatory framework to protect children, parents, teachers and schools when using providers of defined adventurous activities in closely defined environments. The regulations and supporting inspection regime provide a formal process of professional inspection to accredit that providers have effective safety management systems and processes, meeting a national standard.

The definitive source of advice on the Licensing Regulations is to be found in the Health and Safety Executive publication: "*Guidance to the Licensing Authority on Adventure Activity Licensing Regulations 1996*".

Leaders should be aware that the AALS license is an assurance of safety. It does not accredit educational or activity quality.

Refer to OEAP National Guidance: "*Summary of Adventurous Activity Licensing Regulations*"

23. Good Practice Requirements

To be deemed competent, the School Visit / Activity Leader, or Assistant Leader must be able to demonstrate *the ability to operate to the current standards of recognized good practice for that role.*

All staff and helpers must be competent to carry out their defined roles and responsibilities.

OEAP Employer Guidance sets a clear standard to which the School leaders must work. The guidance states:

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

- Knowledge and understanding of their employer’s guidance supported by establishment-led training. It is good practice for employers to provide formal and accredited training to support their guidance e.g. EVC Training, Visit Leader Training and such training may be a requirement prescribed by some employers.
- Knowledge and understanding of establishment procedures supported by a structured induction process specified by the establishment.
- Knowledge and understanding of the group, the staff, the activity and the venue.
- Appropriate experience
- In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification.”

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

Where a Volunteer Helper is a parent (or otherwise in a close relationship to of a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise the Visit Leader's plans for group management. The Visit Leader should directly address this issue as part of the Risk-Benefit assessment.

Refer to LOtC document: *“Good Practice Basics”*

24. The Value and Evaluation of LOtC

The Ofsted report "Learning Outside the Classroom – How Far Should You Go?" (October 2008) makes statements in the strongest terms to support the value of LOtC, including the fact that it raises achievement. The School Heads, Managers, EVCs and Visit Leaders are strongly recommended to familiarise themselves with the main content of this report.

However, it also highlights the finding that even where LOtC is highly valued and provided to a high standard, it is rarely evaluated with sufficient rigor – i.e. in the way that classroom learning is evaluated – and a methodology to address this is provided within the LOtC Employer Guidance document: *“Rigorous Evaluation of LOtC: Meeting Ofsted Expectations and Assuring Quality”*.



Appendix:1

Initial Trip Proposal

Please complete this form and hand to the EVC Lead for authorisation before informing learners or parents of any arrangements. Once this has been authorised you will then be required to complete the relevant paperwork as stated in the Trips Policy and following Plumsun guidelines.

Proposal Information Required			
Name of member of staff leading the trip/residential			
Where are you planning on going?			
Date for trip:			
Additional members of staff attending			
Year group/group of learners attending			
Number of learners attending	Total:		
	Non PP/FSM	PP	FSM
Only fill in this section if there is a cost to your trip. Will the trip most likely be full and therefore all costs will be covered? Please circle yes or no.	Yes	No	
Number of adults needed on the trip – <i>ratio below</i> <i>EYFS, 1:5</i> <i>Y1 – Y2, 1:6</i> <i>Y3 – Y6, 1:15</i> <i>Y7 onwards, 1:20 (minibus capacity is 15)</i>			
Name of adult(s) attending who is first aid trained			
If the trip is for EYFS – name of adult who is paediatric trained?:			
Details of the venue/visit: <i>(Name and contact number)</i>			
Purpose of the trip:			
Which Wootton Park Core Values does this trip promote?	<input type="checkbox"/> Kindness	<input type="checkbox"/> Teamwork	<input type="checkbox"/> Responsibility
	<input type="checkbox"/> Respect		
	<input type="checkbox"/> Positivity		
Do you require the school minibus? <i>(see below for costing)</i>			
Named Driver of the minibus:			
Proposed leaving time and arrival time at destination:			

Proposed time of arrival back at school:	
Trip Mobile(s): Please collect the day before and ensure that they are charged	<input type="checkbox"/> Please check to confirm

Costings

For any costings queries please contact Jean Fraser (j.fraser@woottonparkschool.org.uk) and Becky Parker (r.parker@woottonparkschool.org.uk) to clarify your query (continue to cc the EVC into these communications too).

VAT on Trips etc

You should assume that VAT cannot be reclaimed on school trips and end of year celebration events.

When getting quotes from suppliers you will need to check if they will charge VAT and if they will, the cost including VAT should be used when calculating how much to charge to parents/carers.

The only trips where we may be able to claim VAT are ones where it is an essential part of the national curriculum or part of a syllabus for a public examination e.g. field trips for Geography.

As it is an essential part of the curriculum, we cannot charge for the trip, we can only ask for a voluntary contribution.

No learner can be excluded because their parents/carers are unwilling or unable to pay. If insufficient voluntary contributions are raised to fund a visit, or the school cannot fund it from some other source, then it must be cancelled. This needs to be made clear to parents/carers at the outset.

Non-educational trips will have to have VAT added onto the trip. Examples of non-educational trips are; Ski Trips, Rewards Trips, Residential.

Tick one of the boxes below based on the nature of your trip.

Educational	Non-Educational
<input type="checkbox"/>	<input type="checkbox"/>

Coach Company Quotes

The final coach company chosen and minibus costing must be agreed and authorised by the AP. A minimum of 3 quotes must be received for coach companies.

Coach Company	Costs	Tick coach company used
<i>Country Lion</i>		
<i>Poynters</i>		
<i>KIS Coaches</i>		
<i>Hamiltons Coaches</i>		

Minibus Costs (as agreed by EVC Lead)	
Which budget is to be used? (45p per mile)	

Signed: _____ (EVC Lead) Date: _____

For high value trips please contact Jean Fraser (j.fraser@woottonparkschool.org.uk) and Becky Parker (r.parker@woottonparkschool.org.uk) so they can quickly review the costings to ensure all costs/VAT are being accounted for (continue to cc the EVC into these communications too).

Total cost of activity per learner	
Total cost of coach/minibus per learner	
Total voluntary cost to parents (including +1.36% ParentPay administration cost. Multiply cost by 1.0136	
Authorised by Assistant Principal (Adam Cowdell)	
Signed:	
Date:	

Appendix 2

Visit Leader Emergency Action Card

This card needs to be carried on all school trips.

Emergency Procedure

In the event of an incident overwhelming your team's coping mechanisms, use the following to guide your actions:

1. REMAIN CALM - Assess the situation.
2. Safeguard yourself and then any other uninjured members of the group. Make sure all other members of the party are:
 - accounted for
 - safe
 - adequately supervised
 - briefed to ensure that they understand what to do to remain safe.
3. Delegate Assistant Leaders if possible so you can keep an overview of events and to allow 'concurrent' activity.
4. Call emergency services as appropriate.
5. Carry out first aid to the best of your abilities. Remember the aims of first aid are to
 - a. Preserve life
 - b. Prevent the condition worsening
 - c. Promote recovery

Essential First aid:

1. Casualties need to be able to breath – if they are unconscious this means being put into a safe airway position
2. You need to try to find and stop any serious external bleeding
3. You need to protect the casualty from the environment - keep them warm
4. Monitor their condition, talk to them, reassure them, hold their hand and provide emotional support

Once the immediate situation is contained:

- Inform the school/Establishment Emergency Contact or, if unavailable, your Employer (e.g. the Local Authority or trust) Emergency Contact. They will need the following information:
 - Who you are, which establishment you are from and what your role is within the group
 - What number can you be called back on
 - What is the nature of the emergency
 - How many casualties there are and their status
 - The total number of people in your party
 - Your current location
 - Whether you are staying where you are or moving – if you are moving where to
 - What time did the accident/incident happen

- Liaise with, and take advice from, emergency services if they have attended the scene.
- Consider the physical needs of the group and casualties in terms of shelter, refreshments, transport/repatriation.
- Consider the emotional needs of the group such as removing them from the scene, providing emotional support (they can often do this for each other), giving them useful things to do.
- Control communications - prevent group members from using phones or going online unsupervised or until approval is given.
- Keep a written log of all actions taken, conversations held and a timescale.
- Refer all media, parental or other enquiries to your employer's press office.
- Inform the Foreign Office Consular Assistance Team if abroad.



Plumsun General Contact
Office 0845 8622684
Plumsun Emergency Contact
Ruth Hawker 07885 909761
Becky Clark 07885647345



- To be completed before trip

Name	Telephone	Mobile
My telephone number		
School Contact Number	01604 931139	N/A
Nominated Base Contact (Main Office)		
EVC Leader	N/A	
Head of School: Primary Phase	N/A	
Head of School: Secondary Phase	N/A	
CEO & Executive Headteacher	N/A	
Plumsun (within working hours) For general help or advice	0845 8622684	
NCC Emergency Planning Team (24 hours)	https://www3.northamptonshire.gov.uk/councilservices/children-families-education/schools-and-education/information-for-school-staff/management-and-administration/emergencies-in-schools/Pages/default.aspx	
Resources and useful documents	https://www3.northamptonshire.gov.uk/councilservices/children-families-education/schools-and-education/information-for-school-staff/management-and-administration/emergencies-in-schools/Pages/school_emergency_plans_procedures.aspx	
Emergency services (if travelling abroad)		
Foreign Office Consular Assistance	+44 20 7008 1500	