
Meeting: Children's Services Overview and Scrutiny Committee

Date: 10 March 2015

Subject: Educational Visits and Journeys Annual Report
(September 2013 – August 2014)

Report of: Cllr Versallion, Executive Member for Children's Services

Summary: The purpose of this report is to appraise Children's Services overview and Scrutiny Committee of developments within this area of work and of any issues arising and to also consider a statistical summary of visits undertaken by all schools in Central Bedfordshire

Advising Officer: Sue Harrison, Director of Children's Services

Contact Officer: Pete Hardy, Compliance and Risk Adviser

Public/Exempt: Public

Wards Affected: All

Function of: Council

CORPORATE IMPLICATIONS

Council Priorities:

1. Schools and Academies within Central Bedfordshire are increasingly using 'learning outside of the classroom' as a strategy to both vary curriculum content and to engage with experiential learners. This strategy supports some of the priorities of the Council, namely:
 - Improved educational attainment;
 - Promote health and wellbeing and protecting the vulnerable.

Financial:

2. There are no financial implications.

Legal:

3. Central Bedfordshire Council are an employer of staff in maintained schools and could be held liable where members of their workforce are proven to be negligent in their management of a school visit.

Risk Management:

4. Litigation where the employee is found to be at fault could lead to an adverse effect on the good reputation of the Council.

Staffing (including Trades Unions):

5. Not Applicable.

Equalities/Human Rights:

6. The Compliance and Risk Adviser supports schools in their planning of visits and journeys and provides advice regarding legal responsibilities with regard to the entitlement of all pupils to access the curriculum. Obligations are described in the Disability Discrimination Act (2004) and the Equality Act (2010).

Public Health

7. Not applicable.

Community Safety:

8. Not Applicable.

Sustainability:

9. Not Applicable.

Procurement:

10. Not applicable.

RECOMMENDATION:**The Committee is asked to:-**

- Consider and comment on the content of the Educational Visits and Journeys Annual Report.

Introduction

11. The Health and Safety of pupils on educational visits is ultimately the responsibility of the employer. 64% of Schools in Central Bedfordshire are maintained by the Local Authority and it is the role of the Compliance and Risk Adviser to monitor the compliance of these schools to the Central Bedfordshire Council's Educational Visits and Journeys Policy. This policy is, in turn, underpinned by Health and Safety legislation and other statutory requirements. The role of the Compliance and Risk Team typically involves delivering training to school staff, reviewing the planning and execution of visits, advising schools around visit related issues, reviewing policy advice to schools and authorising 'high' level visits on behalf of the Council.¹
12. The overall planning and monitoring processes are facilitated by the use of EVOLVE. This is an on-line system for the management of educational visits and all maintained schools have been given access to the Central Bedfordshire's portal. This enables the Compliance and Risk Team to have sight of any visit recorded on EVOLVE.

¹ Residential, adventurous and visits abroad are considered 'High' level visits and are approved by the Council. All other visits are required to meet planning standards as determined in the Educational Visits and Journeys Policy but approval is delegated to the Headteacher of the school.

13. Central Bedfordshire Council offer a buyback facility for Academies to enable them to access training, advice and the use of EVOLVE. Approval however remains the responsibility of the Governing Body for all levels of visits.
14. The Compliance and Risk Team is comprised of two staff: Pete Hardy (Compliance and Risk Adviser) and Celia Dawson (Senior Administrator).
15. Current statistics indicate that educational visits and journeys continue to be a valued strategy for teaching and learning in the education of Central Bedfordshire's children across all phases. This is reflected by a year on year increase over the past four years of the number of educational visits undertaken.
16. Supporting resources and documentation continue to be available from the Resources section of EVOLVE. However, to improve teacher accessibility to important information relating to visits and journeys, a dedicated page has now been created on the Schools' Portal.

Executive Summary

17. Central Bedfordshire Council's Educational Visits and Journeys Policy has been recently updated to take account of national updates from the Department for Education and also the Outdoor Education Advisers' Panel National Guidance. **Paragraphs 24, 25, 26.**
18. Training for Educational Visits continues to be well attended and feedback received indicates that courses are valued by school staff. A full report can be found in **Paragraphs 28-32.**
19. Processes for quality assurance and compliance monitoring of visits conducted by maintained schools have been further developed this year. This is in line with an objective identified in the previous Annual Report. Summer Term 2014 saw the introduction of visit observations following consultation with Headteachers and the OEAP Regional Group. **Paragraphs 33-36.**
20. The proportion of schools using EVOLVE has increased again. There are now only 4 of 126 schools eligible to use EVOLVE (3%) that do not use the portal ².
21. The proportion of academies buying back Educational Visits Support remains high. 80% of the 50 academies located within the Central Bedfordshire area have bought back the CBC Educational Visits Support package for the current financial year. A full report can be found in **paragraphs 38-40.**
22. The overall number of visits has increased for the third consecutive year. The academic year 2013-14 saw a 41% increase in the total number of visits from 6,987 to 9,864. A full report can be found in **paragraphs 41-43.**

² 126 is the number of Community Schools + the number of Academies buying back EVJ Service

23. Whilst all employment costs are met through core budgets, other expenses associated with service delivery are funded through income generated by the sale of training and advisory support. During the financial year 2013 -14, income generation returned a surplus slightly in excess of £12,000. This represents a 20% increase on the previous financial year. The most recent predictions for 2014-15 suggest a surplus of at least £14,000. A full report can be found in **paragraphs 44-48**.

National Updates

24. The OEAP National Guidance resource has become the single point of reference for advice and guidance relating to best practice and legislation in respect of the planning, administration and conducting of educational visits. It is comprised of numerous, succinct on-line specific guidance document relating to key areas of consideration in relation to the planning and administration of visits. Its key strength is the ability to revise and update specific guidance documents where there are changes to national legislation or advice around best practice. In the period covered by this report, the following guidance has been updated and posted in the Resources section of EVOLVE:
- First Aid;
 - Group Management and Supervision;
 - Inclusion;
 - Remote Supervision;
 - Transport – Minibuses.
25. During the period covered by this report, two pieces of guidance have been published by the Department for Education that have implications for the planning and execution of educational visit:
- **Supporting pupils at school with medical conditions** became statutory guidance with effect from 01September 2014. It replaces '**Managing medicines in schools and early years settings**' and has clear and concise requirements around the duty of the school to assess the implications of an individual's medical needs, make reasonable adjustments and to ensure that all visits are, as far as is practical, fully inclusive.
 - Statutory Guidance for Early Years and Foundation Stage has been revised. With effect from the 1st September, there is no longer a statutory requirement with regard to adult : child ratio on an educational visit. The actual ratio is determined as a result of risk assessment which is now consistent with advice for all other age groups.

Local Updates

26. In August 2014, the revised Educational Visits and Journeys Policy for Central Bedfordshire was reviewed. It has now been rewritten to incorporate national changes identified **paragraphs 24 and 25**. The updated policy has been uploaded to the Schools' Portal, EVOLVE and circulated as hard copy to all maintained schools and those academies that buy back Educational Visits Support.

27. In March 2014, Central Bedfordshire Council updated its EVOLVE portal to operate the most recent version of the software EVOLVE 2014. This version incorporates a number of refinements to the visit planning function as a result of customer feedback. However, the most notable update was the introduction of KADDI, a searchable database providing a comprehensive list of activities and external providers combined with their geographical location. A guidance document to the updated system is available in PDF format from the EVOLVE homepage.

Training

28. In total, 214 teachers in Central Bedfordshire have received training in relation to Educational Visits and Journeys in the period covered by this report. This figure was lower than last year (299) largely due to the absence of Policy Update Training for which there was no requirement in the period covered by this report. A breakdown can be found in **Appendix A**.
29. The number of staff attending School based Group Leader Training is as a result of twilight sessions delivered at six separate schools (John Donne Lower, Sandye Place Academy, Gothic Mede Lower, Everton Lower, Cedars Academy and Shefford Lower).
30. Training continues to be well received with the vast majority of attendees (81%) considering training as ‘very useful’. This represents a marginal increase in comparison to the analysis of feedback from the previous academic year where 79% of teachers attending whole day training found the experience ‘very useful’. **Appendix B**.
31. Figures for school based EVOLVE training have continued a downward trend owing to the increased availability of local guidance resulting in increased self – reliance of schools.
32. The numbers of teachers attending ‘central venue’ training has slowly grown over the past three years. Whilst there has been a drop off with the number of teachers attending EVC training, this is more than compensated for by attendance at EVC Revalidation Training ³.

³ **EVC Training** now targets newly appointed EVCs. **EVC Revalidation** is for existing EVCs. (In 2011-12 only one course was available for both new and existing EVCs)

Compliance Monitoring and Quality Assurance

33. Compliance monitoring and quality assurance of the educational visit planning process continues to be a key function of the council. It is comprised of the following:
 - Remote monitoring of planning and visit specific documentation via EVOLVE;
 - Ensuring schools adhere to policy requirements with regard to training of Educational Visits Co-ordinators in school thus providing a tier of regulated quality assurance internal to the school;
 - Visits to schools to monitor the work of the EVC and view evidence of visit planning and approval (where not available via EVOLVE);
 - Observation of actual educational visits.
34. The following monitoring visits were made during the last academic year:
 - Five EVC monitoring visits to Campton, Fairfield Park, Maple Tree, Silsoe and St. George's Lower Schools;
 - Four visit observations were conducted for Church End, Campton, Fairfield Park and Maple Tree Lower Schools.
35. In all instances, standards of planning and pupil management on visits were good. Where schools did not make use of EVOLVE, other appropriate systems were in place for planning, approving and keeping of records in relation to visits.
36. The CBC Educational Visits Policy requires EVCs to maintain a formal record of staff competence to supervise or lead an educational visit. This may be required if the School were challenged over an incident as to the competency of the staff. For three of the five EVC visits, this requirement was not being observed by the school. In view of this, a generic letter will be sent to Headteachers of all maintained schools and academies drawing attention to the importance of keeping a formal record of staff competence to supervise school visits.

Academies

37. Academies continue to have the option of buying back the use of EVOLVE and associated advisory support. At the time of this report, 50 Academies exist in Central Bedfordshire. Of these, 80% have chosen to buy back support for educational visits through Central Bedfordshire Council. In the previous academic year, 35 of 46 academies (76%) opted in to the CBC Educational Visits Support Package. Academies choosing to opt out are detailed below.

38. Existing academies continuing to ‘opt out’ during 2013-14 are:
 - Eaton Bray Academy;
 - Eversholt Lower School;
 - Hadrian Academy;
 - Houghton Regis Academy;
 - Lark Rise Academy;
 - Raynsford C of E Academy;
 - St Augustine’s Academy School;
 - The Firs Lower School;
 - University Technical College.
39. Schools converting to academy during the period covered by this report and choosing to opt out:
 - Meppershall
40. In the period covered by this report, two academies who previously ‘opted out’ of the Central Bedfordshire support package have now chosen to opt in:
 - Cranfield CofE Academy;
 - St. Mary’s C of E Academy.

Applications and Approvals

41. A full summary of visits conducted over the past four years can be found in **Appendix C**.
42. The overall number of visits has increased for the third consecutive year. The academic year 2013-14 saw a 41% increase in the total number of visits (from 6,987 to 9,864). During the last academic year, the number rose across all school phases.
43. Comparing 2013-14 data to the previous academic year:
 - There has been a rise in the total number of overseas visits although the actual number of establishments conducting overseas visits has remained constant at 32 for the third consecutive year;
 - There has been a slight decrease in the total number of residential visits (236 to 233) although the actual number of schools conducting this type of visit has risen slightly (90 to 93);
 - There has been a 51% rise (691 to 1,042) in the total number of visits involving adventurous activity delivered by an external provider. The number of visits involving adventurous activities delivered by establishment staff has also risen from 616 to 691 (12%). This corresponds with an increase in the number of establishments organising adventurous visits compared to the previous academic year (92 to 96);
 - There has been a continued annual increase in the number of visits being approved through Special Schools. 2,245 visits were approved during the 2010-11 academic year increasing to 2,593 visits in the last academic year. For the period covered by this report 4,829 visits have been logged.

Finance

44. The Educational Visits and Journeys Service is delivered by the Compliance and Risk Adviser and the Compliance and Risk Senior Administrator. Their salaries and associated employment costs are met through core budgets. Operational costs (subscriptions, memberships and training costs) are financed on a cost recovery basis. This revenue is generated through the training programme and from academies buying back the visits service.
45. For the purpose of this report (which is aligned to the academic year), two financial statements will be reported. These can be found at **Appendix D**.
46. Accounts are healthy with all training comfortably achieving cost recovery and it is anticipated that the service will again, generate a modest surplus (c. £14,000).
47. Predicted income and expenditure for the current financial year is mainly in line with the final position statements for the past two financial years. Income predictions represent a minimum position as they are based either on signed agreements or on known bookings for training ⁴. The income figure is expected to rise slightly before the end of the year once all Service Level Agreements have been signed and the current training portfolio has been delivered.
48. A 2% increase in charges has been applied to both Service Level Agreements and to delegate fees for the Educational Visits training portfolio. A further 2% increase has been applied for the next financial year (2015-16)

Conclusion and Next Steps

49. Compliance monitoring remains a key priority, especially with regard to schools' own formal recording of staff competence to lead or supervise visits. This element of practice provides essential evidence should the school or local authority be challenged as to the suitability of an individual. There is an identified need to:
 - Confirm that maintained schools are compliant with this policy;
 - Advise academies of the need to maintain formal records of staff competence.

⁴ At the time of reporting, 3 academies have still to return their Service Level Agreements. This does not include Redborne who have now declined the service.

Appendices

Appendix A: Number of teachers undertaking ‘visits related ‘training

| | 2011-12 | 2012-13 | 2013 -14 |
|------------------------------|---------|---------|----------|
| Policy Update Training | n/a | 105 | n/a |
| EVC Training | 42 | 29 | 21 |
| Group Leader Training | 30 | 32 | 36 |
| EVC Revalidation | n/a | 26 | 49 |
| School Based EVC Training | 5 | 2 | 1 |
| School Based GL Training | 48 | 68 | 119 |
| School Based EVOLVE Training | 106 | 37 | 0 |

Appendix B: Feedback from visits related training

| Training Type | No. of attendees | Evaluation | | | | |
|-----------------------|------------------|-------------|---------------|-------------|---------------|----------------------|
| | | Very Useful | Mainly Useful | Of some use | Of little use | No feedback provided |
| EVC Training | 21 | 18 | 2 | | | 1 |
| EVC Revalidation | 49 | 35 | 7 | | | 7 |
| Group Leader Training | 36 | 30 | 5 | | | 1 |

Appendix C: Four Year Statistical Summary

| | Academic Year | | | |
|---|---------------|-------------|-----------|-------------|
| | 2010 - 2011 | 2011 - 2012 | 2012-2013 | 2013 - 2014 |
| Lower School | | | | |
| Total no. of visits | 994 | 1,183 | 1,584 | 1,672 |
| Total no. of participants | 36,590 | 43,787 | 51,858 | 54,706 |
| Total no. of days | 1,112 | 1,295 | 1,712 | 1,801 |
| Total no. of participant days | 39,883 | 46,852 | 55,215 | 58,711 |
| Middle School | | | | |
| Total no. of visits | 1,099 | 1,190 | 1,941 | 2,261 |
| Total no. of participants | 41,829 | 47,082 | 62,087 | 69,199 |
| Total no. of days | 1,348 | 1,458 | 2,230 | 2,550 |
| Total no. of participant days | 55,628 | 60,672 | 77,676 | 84,735 |
| Upper School | | | | |
| Total no. of visits | 909 | 755 | 846 | 1,080 |
| Total no. of participants | 21,525 | 18,950 | 19,224 | 18,651 |
| Total no. of days | 1,236 | 1,081 | 1,165 | 1,430 |
| Total no. of participant days | 29,802 | 27,846 | 26,869 | 27,767 |
| Special School | | | | |
| Total no. of visits | 2,245 | 2,318 | 2,593 | 4,829 |
| Total no. of participants | 13,592 | 16,746 | 21,087 | 32,922 |
| Total no. of days | 2,264 | 2,355 | 2,609 | 4,845 |
| Total no. of participant days | 13,764 | 17,014 | 21,188 | 33,043 |
| Youth Service Support (including subcontractors) | | | | |
| Total no. of visits | 71 | 19 | 9 | 8 |
| Total no. of participants | 1,119 | 197 | 100 | 30 |
| Total no. of days | 79 | 30 | 19 | 12 |
| Total no. of participant days | 1,387 | 445 | 230 | 40 |
| Children in Care Council | | | | |
| Total no. of visits | | 6 | 13 | 14 |
| Total no. of participants | | 53 | 116 | 142 |
| Total no. of days | | 6 | 13 | 14 |
| Total no. of participant days | | 53 | 116 | 142 |
| All | | | | |
| Total no. of visits | 5,318 | 5,471 | 6,987 | 9,864 |
| Total no. of participants | 114,655 | 126,815 | 154,484 | 175,650 |
| Total no. of days | 6,039 | 6,225 | 7,749 | 10,652 |
| Total no. of participant days | 140,464 | 152,882 | 181,306 | 204,438 |

Appendix D: Financial Reports

Final Position Statements 2012-13 and 2013-14

| Annual Income | 2012-13 | 2013-14 |
|-------------------------------------|----------------|----------------|
| SLA Income | £14,758 | £17,342 |
| Training Income | £4,375 | £5,580 |
| Total Income | £19,133 | £22,922 |
| | | |
| Annual Expenditure | | |
| EVOLVE Subscription | £4,999 | £4,999 |
| OEAP Membership | £150 | £150 |
| Attendance at OEAP Panel Meetings | £452 | £346 |
| Hire of Training Facilities | £2,824 | £3,400 |
| Stationery, Printing+ Miscellaneous | £674 | £81 |
| Duke of Edinburgh Contribution | | £1,200 |
| Total Annual Expenditure | £9,099 | £10,176 |
| | | |
| Closing Balance | £10,034 | £12,706 |

Current Position Statement 2014-15 (as of September 2014)

| Income | Predicted | Actual |
|--------------------------------------|------------------|----------------|
| SLA Income | £17,805 | £17,109 |
| Training Income | £5,928 | £3,876 |
| Total Income | £23,733 | £20,985 |
| | | |
| Expenditure | | |
| EVOLVE Subscription | £4,999 | £4,999 |
| OEAP Membership | £300 | £300 |
| Attendance at OEAP Panel Meetings | £360 | £0 |
| Hire of Training Facilities | £3,068 | £2,501 |
| Resources | £44 | £44 |
| Stationery, Printing + Miscellaneous | £90 | £26 |
| OEAP Regional Expenditure | £115 | £115 |
| Printing | £466 | £466 |
| Annual Expenditure | £9,442 | £8,451 |
| | | |
| Balances (as of 01.09.14) | £14,291 | £12,534 |