

**Adapted from:  
Worcestershire County Council**

## **Policy for the Management of Visits and Learning Outside the Classroom**

### **1. Provision of Employer Guidance**

Worcestershire County Council has formally adopted "**OEAP Employer Guidance**" as "*Worcestershire Employer Guidance for the Management of Visits and Learning Outside the Classroom*". This guidance can be found on the following web site:

[www.oeapeg.info](http://www.oeapeg.info)

It is a legal expectation that employees **must** work within the requirements of their employer's guidance; therefore Worcestershire Children's Services employees must follow the requirements of "OEAP Employer Guidance", as well as the requirements of this Policy Statement.

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Where another employer (such as the Governing Body of a Voluntary Aided school) wishes to opt into Worcestershire guidance, systems and processes for supporting and monitoring Visits and LOtC activities, they should produce a policy statement that makes this clear.

Where a Worcestershire employee commissions visits or LOtC activity, they must ensure that such commissioned agent has either:

1. adopted Worcestershire or OEAP Employer Guidance.

**or**

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

### **2. Scope and Remit**

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



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

### 3. Ensuring Understanding of Basic Requirements

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

- appropriate guidance relating to visits and LOtC 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 outdoor learning and LOtC in Worcestershire is the OEAP Employer Guidance web site.

The relevant training courses in Worcestershire are:

1. Worcestershire Educational Visit Coordinator (EVC) Training - all Worcestershire Children's Services establishments are required to have a current, Worcestershire-trained EVC in post.
2. Worcestershire Educational Visit Coordinator (EVC) Revalidation - all Worcestershire Children's Services establishments are required to ensure that their EVC undertakes a formal revalidation from time to time.
3. Worcestershire Visit Leader Training – this course is strongly recommended for all those who lead visits and LOtC activities and is a requirement of Worcestershire leaders from September 2011. Currently there is no revalidation requirement. However, to meet OEAP guidance requirements regarding leader competence, leaders must be current in their knowledge of expectations of good practice, so update refresher training is strongly recommended.

For the purposes of day-to-day updating of information, Worcestershire EVCs and Visit / Activity Leaders are directed to the posting of "*EVC Information Updates*" (which include information on how to access the relevant courses) available on the following web link:

**[www.worcestershire/vistsandlotc](http://www.worcestershire/vistsandlotc)**

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

The nominated adviser in Worcestershire is:

**Bill Taylor, telephone: e-mail: [saltybill1@aol.com](mailto:saltybill1@aol.com)**



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#### 4. Approval and Notification of Activities and Visits

Worcestershire delegates the responsibility for formal approval of all Visits and LOtC activity to establishment Heads / Managers. It is a requirement of this policy that Heads and Managers carry out this function in accordance with OEAP Employer Guidance.

Although approval is delegated, establishments must notify the authority of visits and activities falling within any one of the triggers set out below:

- involves a journey more than 50 miles away from base;
- involves a residential or overnight stay;
- involves the provision of an adventurous activity.

The above notification procedure requires the submission of an "OS5" form, an electronic copy of which is supplied at EVC Training. Full details of when and how to submit this form can be found on the form.

#### 5. Risk Management

As an employer, Worcestershire has a legal duty to ensure that risks are managed - requiring them to be reduced to an "acceptable" level - and not to eliminate risks, as would be a reasonable expectation when risk assessing a piece of machinery, work shop or manufacturing process. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring Worcestershire 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. **Worcestershire** 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 Worcestershire 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, Worcestershire EVC Training ensures that establishments are supplied with an electronic portfolio of exemplar generic risk-benefit assessments, as well as exemplar event-specific assessments.

It is strongly recommended that establishments adopt and adapt these materials to ease the burden of bureaucracy that might otherwise discourage leaders from making full use of off-site learning opportunities.

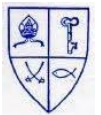
Refer to OEAP EG document: "**Risk Management**"

#### 6. Emergency Planning and Critical Incident Support

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.

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

Refer to OEAP EG document: "**Critical Incident Management for Visits**"

To activate support from Worcestershire, the following telephone number should be used:

**Outside normal office hours: 07836 655932 (current as of 6.1.2016 checked by ST-EVC)**

These 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.

## 7. Monitoring

As an employer, Worcestershire ensures that there is sample monitoring of the visits and LOtC activities undertaken by its establishments, either by attaching such monitoring duties to its officers, or by delegating these tasks to establishments. Such monitoring should be in keeping with the recommendations of OEAP Employer 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.

Refer to OEAP EG document: "**Monitoring**"

## 8. Assessment of Leader Competence

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

Refer to OEAP EG document: "**Assessment of Competence**"

## 9. Role-specific Requirements and Recommendations

OEAP Employer Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within Worcestershire Children's Services management structures. These are:

1. Director of Children's Services
2. Lead Member(s) for Children's Services
3. Line Manager of an Outdoor Education Adviser (or equivalent post)
4. Outdoor Education Adviser
5. Adviser (other than an OEA) including Health and Safety Officer
6. Manager of an Outdoor Centre

Refer to individual OEAP EG documents headed as above.

OEAP Employer Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within most Children's Services establishments. These are:



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Offsite and Residential trips policy.

1. Member of Board of Governors or Management Board
2. Headteacher
3. Manager of an establishment other than a school
4. EVC
5. Visit or Activity Leader
6. Assistant Visit leader
7. Volunteer Adult Helper
8. Those in a position of Parental Authority

Refer to individual OEAP EG documents headed as above.

### 10. Charges for Off-site Activities and Visits

Worcestershire 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 EG document: ***Charges for Off-site Activities and Visits in an Educational Establishment***

### 11. Vetting and CRB Checks

Worcestershire employees who work *frequently* or *intensively* with, or have *regular access* to young people or vulnerable adults, must undergo an enhanced CRB 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.

However, it must be clearly understood that a CRB check (or other vetting procedure) in itself, is no guarantee as to the suitability of an adult to work with any given group of young or vulnerable people.

The placement of an adult within a situation of professional trust (where young people could be vulnerable to physical or mental exploitation or grooming) should always be on the understanding that an overview based on a common sense risk-benefit assessment process has been considered.

Refer to OEAP EG document: ***"Vetting and CRB Checks"***

### 12. 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".

Effective supervision should be determined by proper consideration of:



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- 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 position, Ofsted and DfE guidance do prescribe ratios in Early Years settings.

Refer to OEAP EG document: ***“Ratios and Effective Supervision”***

Refer to OEAP EG document: ***“Group management and Supervision”***

### **13. Preliminary Visits and Provider Assurances**

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
- Adventuremark
- NGB centre approval schemes (applicable where the only provision is a single, specialist activity).

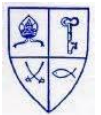
Worcestershire policy is that where a provider holds such one of the above accreditations, there should be no need to seek further assurances.

Refer to: OEAP EG document ***“Preliminary Visits and provider Assurances***

### **14. Insurance for Off-site Activities and Visits**

Employer's liability Insurance is a statutory requirement and Worcestershire 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. Worcestershire also holds public liability insurance, indemnifying it against all claims for compensation for bodily injury from persons not in its employ, 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.

Some level of Personal Accident Insurance is provided for all Worcestershire employees in the course of their employment, providing predetermined benefits in the event of an accident. However, Visit/ Activity Reviewed Jan 2016



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Offsite and Residential trips policy.

Leaders should be advised that they should consider taking out less limited personal accident cover privately, or obtain cover through a professional association.

Worcestershire Visit and Activity leaders should contact the local authority Insurance Section to seek clarification of the above, and to obtain current information regarding any special policies that may be available to offer more comprehensive cover.

Refer to OEAP EG document: ***"Insurance"***

## 15. 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 Disability Discrimination Act 1995, it is unlawful to:

- treat a disabled young person less favourably;
- fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage without justification.

Refer to OEAP EG document: ***"Inclusion as a Legal Issue"***

## 16. Adventure Activities Licensing Regulations

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

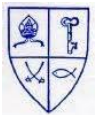
The Activity Centre (Young Persons Safety) Act (1995) established the Adventure Activities Licensing Regulations and the Adventure Activities Licensing Authority (AALA), initially responsible to the DfES. The scheme is now the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

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.

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Offsite and Residential trips policy.

Where Worcestershire's outdoor centres are providers of "in scope" activities as defined by the regulations, they are required to be licensed.

Refer to OEAP EG document: "**Summary of Adventurous Activity Licensing Regulations**"

## 17. Good Practice Requirements

To be deemed competent, a Worcestershire 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 Worcestershire 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.

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 OEAP EG document: "**Good Practice Basics**"

## 18. 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 Worcestershire's transport policy. All national and local regulatory requirements **must** be followed.

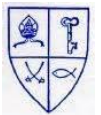
The level of supervision necessary should be considered as part of the risk management process when planning the journey, giving proper consideration to issues of driver-distraction when considering what supervision is required for the specific group of passengers being transported in a minibus.

The Visit Leader should ensure that coaches and buses are hired from a reputable company.

Transporting young people in private cars requires careful consideration. Where this occurs, there should be recorded procedures.

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Offsite and Residential trips policy.

Refer to OEAP EG document: “**Transport: General Considerations**”

Refer to OEAP EG document: “**Transport in Minibuses**”

Refer to OEAP EG document: “**Transport in Private Cars**”

## 19. 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.

It is strongly recommended that at a very early stage of the planning process, the provisional staffing team carry out a brain storming exercise in order 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 also 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 performance indicators.

To reduce bureaucracy and encourage activity, establishments need to take 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.

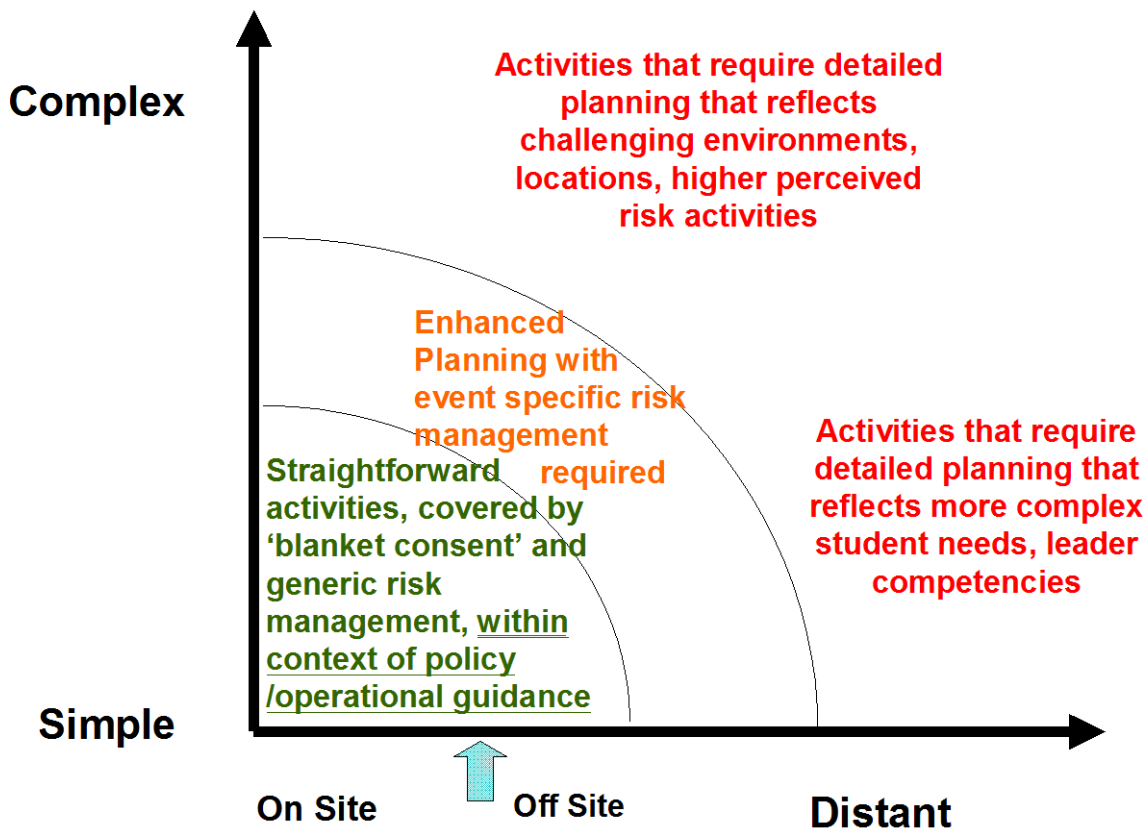
The degree of complexity of a particular plan or policy (along with its supporting procedures) will need to reflect the nature and complexity of several variables that can impact on any given activity. These variables can be remembered as “**SAGED**” as explained below.

- **S**taffing requirements – trained? experienced? competent? ratios?



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- **A**ctivity characteristics – specialist? insurance issues? licensable?
- **G**roup characteristics – prior experience? ability? behaviour? special and medical needs?
- **E**nvironmental conditions – like last time? impact of weather? water levels?
- **D**istance from support mechanisms in place at the home base – transport? residential?



Refer to OEAP EG document: **"Planning Basics"**

Refer to OEAP EG Power Point: **"Planning Visits Off-site Activity and LOtC"**

## 20. 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. Worcestershire Heads, Managers, EVCs and Visit Leaders are strongly recommended to familiarise themselves with the main content of this report.

Refer to OEAP EG document: **"Ofsted and LOtC Summary"**

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 OEAP Employer Guidance document: **"Rigorous Evaluation of LOtC: Meeting Ofsted Expectations and Assuring Quality"**.



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