



## **Policy for the Management of Off-site Activities and Visits**

**Date:** March 2018  
**Review Date:** March 2019  
**Person Responsible:** Executive Principal



**Vale of Evesham School**  
"A specialist school for cognition and learning - enabling inclusion in the community"

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## 1. Provision of Employer Guidance

Advance Trust has formally adopted “**OEAP National Guidance**” as visit guidance across the member establishments. This guidance is recommended by DfE and endorsed by HSE and a number of professional associations such as NAHT and NUT. It can be found on the following web site:

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

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

Employees should also follow OEAP NG recommendations.

Where an employee of the trust commissions off-site activity, they must ensure that such commissioned agent has either:

1. adopted OEAP National Guidance

or

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

## 2. Scope and Remit

The OEAP NG document 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 or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

## 3. Ensuring Understanding of Basic Requirements

The trust ensures that staff are provided with:

- appropriate guidance relating to visits and LOtC activity;
- 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 visits in consortium schools is the OEAP National Guidance web site.

The relevant training courses are:

1. OEAP-accredited Educational Visit Coordinator (EVC) Training (3 years)
2. Educational Visit Coordinator (EVC) Revalidation – consortium members are required to ensure that their EVC undertakes a formal revalidation within the recommended period (**3** years).
3. OEAP-accredited Visit Leader Training – this course is a requirement of consortium Visit Leaders and any Assistant Leaders that are called upon to work without immediate access to a trained Visit Leader. While there is no revalidation requirement, to meet OEAP NG guidance requirements regarding leader competence, leaders must be current in their knowledge of expectations of good practice - update refresher training every 4 years is strongly recommended.
4. OEAP-accredited Visit Emergency Training – this course is strongly recommended for those staff that draft school emergency policies and procedures for visits; staff that take on the role of a designated emergency contact and for staff who are appointed as an EVC and therefore need to take an over-view of all matters pertaining to educational visits and off-site activities.

For the purposes of day-to-day updating of information, trust EVCs and Visit Leaders are directed to the posting of the appointed Adviser's "*EVC Information Updates*" from time to time and to course schedules/promotion documents.

Where a member of staff experiences problems with finding the material they are looking for, or require clarification or further help and guidance, they should contact their Educational Visits Coordinator (EVC). At the discretion of the EVC, the member of staff may be directed to the appointed adviser.

**The nominated adviser for Advance Trust is:**

**Bill Taylor, B and S Educational Systems and Training Ltd.**

**Telephone: 01239 654571**

**E-mail [saltybill1@aol.com](mailto:saltybill1@aol.com)**

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

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.

Formal approval of all visits and off-site activities is the responsibility of the Head of the establishment. It is a strong recommendation of this policy that the EVC assists with this function, ensuring that all visits and off-site activities are run in accordance with OEAP National Guidance.

Trust EVCs **MUST** notify the appointed adviser of visits and activities falling within any one of the triggers set out below:

- involves a residential or overnight stay;
- involves the provision of an adventurous activity;
- involves an activity where the EVC would like further guidance.

The above notification procedure requires the Visit Leader to submit a completed F1 form to the EVC. The EVC will then enter the relevant F1 information on form F2 to for submission to the appointed Adviser as an e-mail attachment.

## 5. Risk Management

There is 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 the trust establishments to provide such support, training and resources as is necessary to implement this policy.

The risk management of an activity should be informed by the benefits to be gained from participating. Staff leading visits should use 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 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. Trust establishments are required to use a format for recording risk-benefit assessments based on that recommended in EVC Training. An electronic portfolio of exemplar generic risk-benefit assessments, as well as exemplar event-specific assessments using these materials is supplied in the **B and S Educational Systems and Training Ltd** EVC training course and should be made available to Visit Leaders.

## 6. Visit Emergency Support

Trust establishments must work to the requirements of the trust Policy for the Management of Visit Emergencies.

## 7. Monitoring

Trust establishments must ensure that there is sample monitoring of visits and off-site activities. Such monitoring should be in keeping with the recommendations of OEAP National Guidance and recommended during EVC training. This responsibility should be managed by EVCs.

## 8. Assessment of Leader Competence

OEAP National Guidance provides specific advice regarding the assessment of leader competence. It is an expectation of this policy that all leaders and their assistants have been formally assessed as competent to undertake such responsibilities as they have been assigned. All EVL's must attend a Visit Leader course via **B and S Educational Systems and Training Ltd**. This training is valid for 3 years.

## 9. Role-specific Requirements and Recommendations

OEAP national Guidance sets out detailed responsibilities and functions of specific roles that relate to roles to be found within educational establishment management structures. These are:

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

Refer to individual OEAP NG web site documents headed as above.

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

Employees with visit responsibilities 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.

## 11. Vetting and DBS Checks

Staff who work *frequently* or *intensively* with, or have *regular access* to young people must undergo a 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.

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

The placement of an adult within a situation of professional trust (where children 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.

## 12. Requirement to Ensure Effective Supervision

Employees with a visit leadership role must meet legal and good practice requirements with regard to 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:

- staff competence;
- activity undertaken – its nature and location, including duration, skill levels involved, as age (including the developmental age) of the group;
- group characteristics – developmental age, gender, ability (including special learning needs) behavioural, medical and vulnerability characteristics;
- environment - time of year, prevailing conditions and impact of sudden change as caused by flood, snow etc.
- distance from base and availability of support.

## 13. Preliminary Visits and Provider Assurances

**All visits should be thoroughly researched to establish the suitability of the venue, suitability of the activity 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 children. It is a vital dimension of risk management.**

Wherever reasonably practicable, it is *good practice* to carry out a preliminary visit.

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).

**Advance Trust takes the view that where a provider holds one of the above accreditations, there should be no need to seek further assurances.**

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

Employer's Liability Insurance is a statutory requirement and cover should extend to those persons who are acting in a voluntary capacity as assistant supervisors. The trust must also hold Public Liability insurance, providing indemnity 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. Trust employees (as agents of the employer) are indemnified against all such claims, as are voluntary helpers acting under the direction of the trust.

Trust leaders should be advised to take out personal accident cover, or obtain cover through a professional association.

## 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.

Visit Leaders should take all *reasonably practicable* measures to include all children. 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.

EVCs and Visit Leaders should be aware of the extent to which Inclusion is or is not a legal issue.

Under the Equality Act 2010, 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.

## 16. Adventure Activities Licensing Regulations

Managers, EVCs and Visit 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 AALA license is an assurance of safety. It does not accredit educational or activity quality.**

## 17. Good Practice Requirements

To be deemed competent, a Visit Leader must be able to demonstrate "*the ability to operate to the **current standards** of recognised good practice*" **for that role.**

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

OEAP National Guidance sets a clear standard to which trust leaders **must** work:

*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 through **B and S Educational Systems and Training Ltd.***
- *Knowledge and understanding of establishment procedures supported by a structured staff Induction process.*
- *Knowledge and understanding of the group, the staff, the activity and the venue/environment.*
- *Appropriate experience.*
- *In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification is required.*

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 member of staff or *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.**

## **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 their adopted 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 and staff should complete a Transporting Pupils in Personal Vehicles form.

## **19. Planning**

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

- The plan is based on National Guidance and local procedures.
- All staff (including any adult volunteer helpers) and the children 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).

- Trained, Designated Emergency Contacts have been identified. Where appropriate, these must be available on a 24/7 basis.
- All details of the activity provision are accessible to the Emergency Contacts throughout the period of the activity.

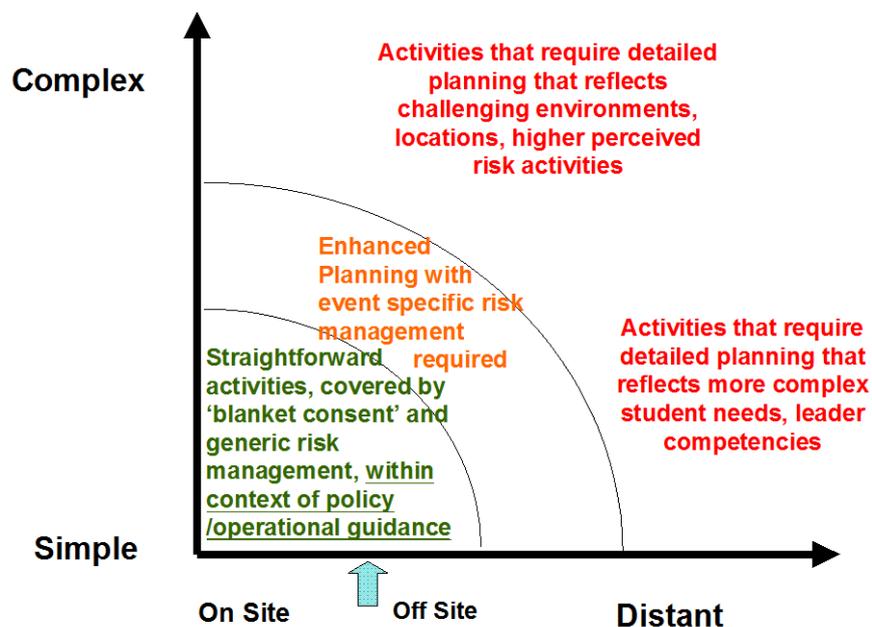
At a very early stage of the planning process, the provisional staffing team should carry out a planning exercise in order to identify the benefits and learning outcomes that the activity (or range of activities) might achieve. If the outcomes are to be evaluated with any rigor (an Ofsted expectation), 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?
- **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?



See Appendix 1 Newbridge LoTC/Educational Visit/Trip Flow Chart and Checklist of Planning Cycle and paperwork.

## 20. The Value and Evaluation of Off-site Activities and Visits

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 off-site activities and visits, including the fact that it raises achievement. Governors, 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 outdoor learning 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. **It is an expectation of this guidance document that the organisation and learning outcomes of all visits and off-site activities are properly evaluated.**

# NEWBRIDGE

## Lotc/Educational Visit/Trip Flow-Chart

**Investigate visit/trip & Outline Proposal**  
**[4-3 weeks lead time]**  
*[SAGED Plan/Offsite Activity Request Form - Educational objectives/learning outcomes]  
Cost? What if? Plan, Preliminary visit if necessary)*



**Meet with EVC (SC/HP)**  
**[3-2 weeks lead time]**  
*Finalise Action Plan for making trip achievable  
EVC to go over checklist of paperwork and identify any changes or extra paperwork needed for SLT approval  
(Note: Category B - residential visit, visit over 50 miles away 6-4 weeks notice)*

**EVC to check and sign paperwork**



**All paperwork to SC by Wednesday**

**Complete all paperwork/checklist**  
**[2 week lead time – deadline Weds for SLT Thurs]**  
*See Planning Cycle & Paperwork for LoTC checklist  
EVC (SC/ HP) to support and guide through process*

**SC present to SLT Thursday 1pm**

**Agreed**



**Paperwork to Office/EVC/Staff on trip**

**Not Agreed**



**Make Changes**



**Represent paperwork to SLT**

Visit: \_\_\_\_\_ Visit Leader: \_\_\_\_\_

## Checklist of Planning Cycle & Paperwork for LoTC – Newbridge

### 4-3 weeks before event (minimum)

- Completed **SAGED** Plan.
- Complete **Off-site Activity Request Form** for SLT authorisation   
[including named Deputy Leader/costs/budget/discuss payment method]
- Complete **Staff Cover** request form [if applicable]
- Book Transport [if applicable] – ensure on Transport calendar
- Student list drawn up/Letter Home for Parental Permission (optional)
- Venue Risk Assessment (obtain venue copies if applicable & insurance documents)
- Venue Location/Route Map
- Activity Risk Assessment (obtain venue copies if applicable or create own)
- **Learning outcomes defined for each student**

**PRESENT TO EVC FOR SLT AUTHORISATION – Wednesday**

### 2-1 week before event

- Staff ratio to student allocation – 1:1's
- Transport Seating Plans: **9 Seater**  **14 Seater**
- Emergency contact/medical details for students
- Emergency contact details for staff
- Emergency lead contact numbers
- Finalise student list and print out Individual Pupil Risk Assessments
- Finalise Itinerary

**PRESENT TO EVC FOR SLT APPROVAL – Wednesday**

#### Once Agreed by SLT

- Collate permission slips
- Catering requirements booked (Off-site Catering Form)
- Complete Petty Cash Request if required – **2 weeks before**
- Photocopy relevant visit documentation/emergency contact information support staff/sub/group/ Risk Assessments

#### Day prior to visit EVL responsible for visit team briefing:

[Risk Assessments/Itinerary/1:1 Support Roles/Equipment/Transport/Fuel check]

#### Post Trip

- Complete Post Visit Assessment with trip team
- Amend Visit Risk Assessments/Student Risk Assessment as necessary
- Fill in Education Visits Book
- Display/Corridor/Classroom Displays

#### OFF-SITE VISIT/PROVISION SLT APPROVAL:

Name: \_\_\_\_\_ Position: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_ 201\_