

## **S17 Policy for the Management of Learning Outside the Classroom (LOtC) and Off-site Visits**

**Last Reviewed:** March 2016  
**Next Review:** March 2018  
**Responsible:** Vice Principal: Business Operations

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**The Bushey Academy acknowledges the immense value of off-site visits and related activities to students, and fully supports and encourages those that are well planned and managed.**

## 1. Provision of Guidance

The Bushey Academy has formally adopted the Outdoor Education Advisers' Panel's (OEAP's) "National Guidance" as its own guidance and principle source of guidance and information regarding good practice for LOtC and Off-site Visits.

It is a legal expectation that all employees of the academy work within the requirements of this guidance and must therefore follow the requirements as set out in this Policy Statement, in conjunction with the Outdoor Education Advisers' Panel "National Guidance" (reference: <http://oeapng.info/>). *Where there is any variance of policy between the national guidance and this policy statement, the academy's policy requirements will take precedence over any guidance.*

Where the academy commissions LOtC activity via an external source or agent, staff must ensure that such commissioned agent either:

1. meets the requirements as set out in this policy statement
2. meets the requirements of the OEAP National Guidance **or**
3. has systems and procedures in place where the standards are not less than those required by OEAP National Guidance.

## 2. Scope and Remit

This policy applies to staff 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.

For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the NG document: **3.2a ["Underpinning Legal Framework"](#)**

## 3. Ensuring Understanding of Basic Requirements

The Bushey Academy has in post an experienced senior member of staff, trained as the Events and Visits Co-ordinator (EVC), whose remit includes the provision of the following:

- appropriate guidance and processes relating to visits and LOtC activity
- training courses to support the guidance as appropriate
- suitable systems and processes to ensure that those trained are kept updated
- access to advice, support and further training from experienced staff who have proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

The academy uses a web-based system called 'EVOLVE' to facilitate the efficient planning, management, approval, and evaluation of visits. All staff that lead or administer visits can access their own EVOLVE account, which is set up by the Educational Visits Co-ordinator (EVC). As well as being an efficient tool for planning and approving visits, EVOLVE also contains a variety of features including: search and report facilities, downloadable resources and information, staff records and visit history, gateway access for parents, risk assessments, etc.

To ensure there is adequate support and expertise available and to help fulfill its health & safety obligations, the academy will ensure that there are two senior members of staff trained in the Management of Off-site Visits. The academy's trained Educational Visits Co-ordinator (EVC) is the Assistant Principal: Teaching and Learning and the trained approving manager is the Vice Principal: Business Operations, who has been delegated this responsibility by the Principal.

The academy will ensure that there is a current policy in place for educational and off-site visits, that this is reviewed as necessary, and is readily available to staff.

The EVC will support the approving manager in ensuring that competent staff are assigned to lead and accompany visits (see Section 8) and that all relevant documentation and consents are in place before a trip is approved. Any concerns must be immediately brought to the attention of the approving manager as soon as they are identified.

*Note*

Refer to NG document **3.4g** ["Responsibilities Headteacher/Managers"](#)

Refer to NG document: **3.4j** ["Responsibilities EVC"](#)

Staff leading or supervising visits or activities must be competent to do so. The EVC must assess competence, taking account of staff's ability to lead, manage and control students partaking in the visit. Competence on specific activities may also be necessary, as well as knowledge of the venue being visited.

*Adventurous Activities*

The academy acknowledges the immense educational benefits that adventurous activities can potentially bring to young people, and fully supports and encourages adventurous activities that are correctly planned, managed and conducted.

Where an adventurous activity is planned, as defined in the Adventure Activities Licensing Regulations 1996 (climbing, caving, remote trekking, waterborne activities), and other activities that present hazards over and above those in everyday life, the EVC and approving manager must ensure that the Visit Leader and other supervisors/staff are suitably competent to lead or instruct the students in the activity. Where there are queries regarding the competencies/experience required, advice must be sought from Hertfordshire County Council's Off-site Visits Adviser.

The nominated adviser in Hertfordshire is:

Mark Falkingham,

Off-site Visits Adviser and Outdoor Education Team Manager (OVA)

[E-mail evolvesupport@hertfordshire.gov.uk.](mailto:evolvesupport@hertfordshire.gov.uk)

## Other Areas

Staff competence in first aid, minibus driving, life-saving etc may also be needed, depending on the activity. Volunteers will also require induction training prior to a specific visit. Training requirements in these areas should be identified as part of the risk assessment process.

## 4. Approval and Notification of Activities and Visits

Although approval is delegated to the academy, there remains a requirement to notify Hertfordshire County Council of visits and activities falling within any one of the categories set out below:

- involves the provision of an 'adventurous activity' to be led by a member of academy staff
- involves field work to be led by a member of academy staff in an area of "wild country"
- involves a journey abroad or a significant sea crossing (this includes visits to the Isle of Man, Northern Ireland, the Orkneys and the Shetland Islands).

Hertfordshire uses the on-line system for notification and approval, 'EVOLVE'. A key feature of this system is that visits and LOtC activities requiring notification are automatically brought to the attention of the Authority upon approval.

All notifiable visits should be submitted via EVOLVE to Hertfordshire at least 4 weeks before the departure date. This will give sufficient time for the Off-site Visits Adviser to review the visit and advise of any suggested amendments which may then be acted upon before the visit departs.

For further advice and help using the system, contact: [evolvesupport@hertfordshire.gov.uk](mailto:evolvesupport@hertfordshire.gov.uk).

## 5. Risk Management

The Bushey Academy has a duty to ensure that risks are managed - requiring them to be reduced to an "acceptable" or "tolerable" level. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring the academy to provide such support, training and resources to staff 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 academy 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 students 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. Staff at the academy have access to an electronic portfolio of exemplar generic risk assessments via the EVOLVE system. Staff must review and adapt the generic risk assessments to ensure that they are appropriate for their specific events and are in line with current practice, and submit these for review as part of the approval process.

Note

Refer to NG document: **4.3c** [“Risk Management”](#)

## 6. Emergency Planning and Critical Incident Support

Staff involved in a visit must be aware of and adhere to the academy’s policy on emergency procedures (as set out in the academy’s Critical Incidents Plan – available from the academy’s EVC).

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.

Note

Refer to NG document: **4.1i** [“Emergencies and Critical Incidents – An Overview”](#)

In addition, to activate support from Hertfordshire, the following telephone numbers should be used:

Monday – Friday 08.30-17.30, Saturday 09.00-16.00: **01438 737261**

All other times: **0800 547547**

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 students or to their parents or carers.*

## 7. Monitoring

The Bushey Academy ensures that there is sample monitoring of the visits and LOTC activities undertaken and these are principally carried out through a review of the EVOLVE system and other available documentation, by the EVC.

Note

Refer to NG document: **3.2b** [“Monitoring”](#)

See also **5.1c** [“Rigorous Evaluation of LOtC meeting Ofsted Expectations”](#)

## 8. Assessment of Leader Competence (see also Section 3 above)

National Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of the academy’s policy that all leaders and accompanying staff have been assessed as competent to undertake such responsibilities as they have been assigned in line with the guidance.

Note

Refer to NG document: **3.2d** [“Assessment of Competence”](#)

## 9. Role-specific Requirements and Recommendations (see 3.4 of National Guidance)

The roles and responsibilities of each member of staff involved in the activity/visit must be clearly identified in the documentation for ease of reference and to ensure responsibilities are clearly communicated and accepted.

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

Please refer to the academy's Charging and Remission Policy (S6).

*Note*

Refer to NG document: **3.2c** ["Charging for School Activities"](#)

## 11. Disclosure & Barring Service (DBS) Checks

All academy staff undergo enhanced DBS checks and evidence of satisfactory checks will be requested from external providers as appropriate.

*Note*

Refer to NG document: **3.2g** ["Vetting and Disclosure and Barring Service 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".

The academy requires visit leaders to ensure there is an appropriate level of supervision at all times and that such supervision is effective and appropriate to the activity. Staffing ratios must be approved by the EVC and approving manager.

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.

Staff assigned to support the special needs of particular individuals cannot be included in the overall staffing ratio. Their responsibility should not include the wider group.

Consideration should be given to the implications of one member of staff effectively being removed from the intended supervision arrangements for a period of time e.g. to accompany a student to hospital.

Particular consideration should be given to the additional implications that may arise if staff are to be accompanied by family members (or partners) on visits. Any such arrangement must be made with specific agreement by the approving manager beforehand, together with a risk assessment where appropriate.

*Note*

Refer to NG documents: **4.3b** ["Ratios and Effective Supervision"](#), **4.2a** ["Group Management and Supervision"](#) and **4.3e** ["Safeguarding"](#).

## 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 students. 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, which remove the need for use of Provider Assessment Forms (OV 6) and sight of Safety Management Systems documentation including risk assessments.

Examples of such schemes include:

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

The academy takes the view that where a provider holds any of the above accreditations, there should be no need to seek further assurances, unless there is specific and credible cause for concern.

*Note*

*Refer to: NG document **4.4h** [“Using External Providers and Facilities”](#)*

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

Employer’s Liability Insurance is a statutory requirement and the academy has in place relevant cover and indemnity. The academy also holds Public Liability Insurance. The indemnity covers activities such as off-site activities and visits organised by the academy and settings for which the academy is responsible.

It is the Visit/Activity Leader’s responsibility to ensure that they are aware of the cover in place and any limitations, and that these are communicated effectively to all staff and students (and their parents) involved in the visit or activity.

Visit and Activity Leaders should contact the academy’s Finance Manager 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.

*Note*

*Refer to NG document: **4.4c** [“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 students 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.

The principles of inclusion should be promoted and addressed for all visits and reflected in the academy’s policy, thus ensuring an aspiration towards:

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

Visit Leaders and staff at the academy involved in overseeing, planning and approving visits and activities 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 young person to whom one of the protected characteristics applies less favourably
- fail to take reasonable steps to ensure that such persons are not placed at a substantial disadvantage without justification.

*Note*

Refer to NG document: **3.2e** [“Inclusion”](#)

See also docs **4.4i** [“Special Educational Needs and Disability”](#), **6e** [“Special Needs Provision”](#)

Also see [“Hertfordshire Children in Need and Children Looked After Manual”](#)

## 16. Adventure Activities Licensing Regulations

The EVC, approving manager and Visit Leader 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 DfE. 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.

Leaders should also be aware that Local Authority-operated centres are not exempt from the regulations. Where Hertfordshire’s outdoor centres are providers of “in scope” activities as defined by the regulations, they are licensed accordingly.

*Note*

Refer to NG document: **3.2f** [“AALA Licensing”](#)

## 17. Good Practice Requirements

To be deemed competent, a Visit /Activity Leader, or Assistant 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.

National Guidance sets a clear standard to which leaders must work. Academy practice supports the guidance, which 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 establishment’s guidance supported by establishment-led training*
- *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 original documents and certificates when verifying a leader’s qualifications, and not rely on photocopies.

Where a Volunteer Helper is a parent (or otherwise has a close relationship with a student 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 and it should be documented in the Risk Assessment.

*Note*

Refer to NG document: **4.3a “Good Practice Basics”**

See also **4.3c “Risk Management”**, **5.2b “Planning Basics”**, **5.1c “Rigorous Evaluation”**

## **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 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, for example, 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. Refer to NG document: **4.5a “Transport: General Considerations”**

### *Minibus and Private Vehicle Use*

All staff must hold category D1 entitlement on their driving licence in order to drive a minibus where the academy is the employer, unless using a minibus that is exempt from this requirement.

Recommendations for minibus drivers are:

- all drivers should take a break every 2 hours (or sooner if tired)
- the break should be a minimum of 15 minutes. Second and subsequent breaks may need to be longer to prevent fatigue
- after 4 and a 1/2 hours of driving, the accumulated length of breaks from driving should be at least 45 minutes.

Transporting students in private cars requires careful consideration. Where this occurs, there should be recorded procedures. EVOLVE Form OV7D is available for this purpose.

*Note*

Refer to NG document: **4.5b** [“Transport in Minibuses”](#) **4.5c** [“Transport in Private Cars”](#)

## **19. Planning**

Visit planning includes consideration of the question: *‘What are the really important things that we need to do to keep us safe?’* It should focus on those issues that are individual to the specific event, taking into account the needs of the group (including special and medical needs), the experience and competency of the staff team, and the Leader in the context of the event. Significant issues must be recorded on EVOLVE and shared with all relevant parties.

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

- the plan is based on the academy’s procedures and guidance
- all staff (including any adult volunteer helpers) and the students 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 meet 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 rigour, then it will be essential that these outcomes are prioritised and appropriately targeted. A record of these outcomes will help keep the plan focused and also be a vital part of the risk management process in providing some objectivity in a “Risk-Benefit Assessment”. Once the targeted outcomes have been recorded, it will then be possible to identify appropriate on-going review and evaluation strategies, including indicators.

Leaders 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, it is considered to be good practice to ensure that those in a position of parental responsibility are fully informed.

Note

See NG 4.3d [“Consent”](#)

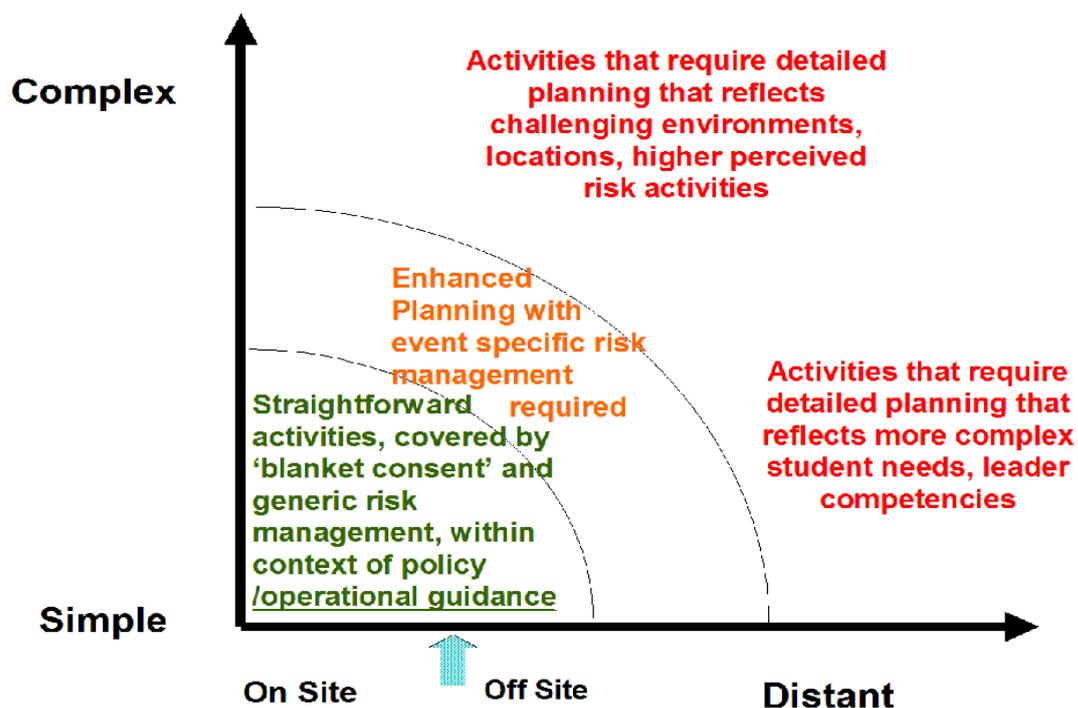
This supports the move towards developing activity-specific policies at the academy for regular or routine activities. Such policies should be robust and equate to “*operational guidance*” that makes it clear how the activity should be planned and delivered, meeting all necessary recommendations and 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 “**STAGED**” as explained below.

It is good practice to involve participants in the planning and organisation of visits, as in doing so they will make more informed decisions, and will become more ‘risk aware’ and hence at less risk. They will also have greater ownership of the event.

This practice is endorsed by HSE in [Principles of Sensible Risk Management](#)

- **S**taffing requirements – trained? experienced? competent? ratios?
- **T**iming – when? For how long?
- **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?



Note

Refer to NG document: [5.2b “Planning Basics for Outdoor Learning, Off-site Visits and Learning Outside the Classroom”](#)

## 20. Consent and Consent Forms

Whilst there is no legal requirement for schools to obtain parental consent for off-site activities that are curriculum-related and take place in normal school hours, the academy believes it is good practice to inform parents/carers of any such event, provide details of the activity and location, and give an opportunity for parents to raise any queries about the activity or concerns regarding their child’s involvement.

For residential visits, those involving adventurous activities and for which a charge is made, specific consent must be sought. It is important that, as far as is reasonably practicable, sufficient detail is provided about intended arrangements as to allow *informed* consent to be given (i.e. based on sufficient and relevant information so as not to be able to subsequently claim “I didn’t know...”).

Through the EVOLVE system, the academy provides an Event Specific Consent Form (OV7a) and an Annual Consent Form (OV7c) for routine and curriculum-related off-site activities which will also be used to update any additional relevant information such as emergency contact details, food allergies, medical conditions and any additional support which the student may require. There is also a Self-Consent Form (OV7b) for use with adults and young people living independently.

The information contained on these forms should be regarded as sensitive and, as such, subject to Data Protection restrictions. For visits within the UK, the academy’s emergency contact must have access to that information and the Visit Leader is also required to carry copies of consent forms with them.

Alternatively they can utilise the Participants Summary Information Form (OV8) containing emergency contact numbers and essential details regarding specific needs, medical or dietary requirements etc. For visits outside the UK, consideration must be given to the security of any consent forms taken and the information they contain.

Note

Refer to NG document [4.3d “Consent”](#)

## 21. 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.

Note

Refer to NG document: [2.4a “Ofsted 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 rigour* – i.e. in the way that classroom learning is evaluated – and a methodology to address this is provided within the National Guidance document:

Note

Refer to NG document: [5.1c “Rigorous Evaluation of LOtC meeting Ofsted Expectations”](#)

## 22. Review and History

This policy will be reviewed on a two yearly basis or sooner as required.

<b>Version</b>	<b>Date</b>	<b>Changes</b>	<b>Approval</b>
1	March 2016	Full Policy Review – in line with published National Guidance and Hertfordshire County Council Procedures and Policy	FGB