

Health, Safety and Wellbeing Management Arrangements

Core | Consider | Complex

# Learning outside The Classroom (LOtC) Educational Visits

Health, Safety and Wellbeing Service

Supporting you in managing Health, Safety & Wellbeing



## 1. Success Indicators

- a) The school/service has their own documented arrangements for Learning Outside the Classroom (LOtC)/Educational Visits which:
  - Outlines its expectations of how learning outside the classroom, outdoor learning and off site visits will be managed and
  - Explains the procedural requirements, clarifies the responsibilities of all stakeholders and outlines monitoring arrangements.
- b) The school/service adopts and works within the Outdoor Education Advisers' Panel (OEAP) National Guidance (NG) and staff with responsibilities in this area have access to this guidance.
- c) The school/service has appointed an Educational Visits Co-ordinator who is trained in line with the requirements of section 5.
- d) Maintained schools use the EVOLVE system to record, approve and manage educational visits – this is a recommendation for academies and other non-maintained schools.
- e) Staff and students taking part in educational visits have received suitable and sufficient information, instruction and training appropriate for their responsibilities.
- f) Schools/services have an emergency plan in place for every educational visit which is suitable and appropriate for the visit.
- g) Appropriate communication about the educational visit, health and safety information and any emergency arrangements are communicated to all relevant parties such as staff, students and parents.

## 2. Overview

These Management Arrangements are in place for maintained schools and services where Staffordshire County Council (SCC) is the employer such as; community and voluntary controlled schools, community special schools, maintained nursery schools and other areas and activities of SCC where educational visits take place.

Non-maintained schools/academies and other settings may wish to use these Management Arrangements as guidance.

## 3. Management Arrangements

Staffordshire County Council has formally adopted the Outdoor Education Advisers' Panel (OEAP) National Guidance (NG) as its guidance for the management of off-site visits and learning outside the classroom. This guidance can be found on the following web site:

<http://oeapng.info>

These Management Arrangements outline the main requirements for LOtC and gives links to appropriate sections of the National Guidance for additional information as required.

Schools/services are required to have their own Learning Outside the Classroom (LOtC)/Educational Visits arrangements. This should be specific to the establishment although the requirements of SCC Management Arrangements should still be adhered to. For further information and guidance please refer to the NG document [How to Write an Establishment Visit Policy \(Document 5.3b\)](#)

Where a SCC employee commissions LOTC activity, they must ensure and record that such a commissioned agent has either adopted National Guidance or has systems and procedures in place where the standards are not less than those required by National Guidance.

#### **4. Scope and Remit**

SCC Management Arrangements applies to schools/services whose work involves any one of the following:

1. Direct supervision of young people or others:
  - undertaking experiences beyond the boundary of their normal operational base;
  - undertaking experiences that fall within the remit of Learning Outside of the Classroom;
2. Facilitating experiences for young people or others undertaking experiences beyond the boundary of their normal operational base;
3. Deploying staff that will supervise or facilitate experiences for young people or others undertaking experiences beyond the boundary of their normal operational base.

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

For further clarification of legal explanations, all users of the guidance are strongly recommended to read the NG document [Underpinning Legal Framework \(Document 3.2a\)](#).

#### **5. Roles and Responsibilities**

The National Guidance "[Legal framework and employer systems](#)" sets out clear roles and responsibilities for specific staff within each establishment which include:

- Management Boards and Governing Bodies.
- Headteachers and Managers.
- Educational Visits Coordinator (EVC).
- Visit and Activity Leaders.
- Assistant Leaders.
- Volunteer helpers.
- Those in a position of parental authority.

The National Guidance also sets out requirements and recommendations for roles within SCC including:

- Director of Children's Services and Lead Member(s) for Children's Services.
- Line manager of an Outdoor Education Adviser (or equivalent post).
- Outdoor Education Adviser.
- Advisers (other than an OEA), including Health & Safety Officer.
- Manager of an outdoor centre.

#### **Educational Visits Coordinators (EVC)**

All schools/services that carry out educational visits are required to have a trained EVC in post. EVC's should attend revalidation training periodically (every 3 years) or other appropriate systems should be in place to ensure EVC's stay up to date with current systems and best

practice. In addition to attending a training course, an EVC should have prior experience of leading educational visits or have support from other establishment employees who are experienced in leading LOtC.

Training courses are available through Entrust and are delivered by the Entrust Educational Visits Advisor (EVA) who is an endorsed OEAP trainer.

### **Visit Leaders**

Where an employee regularly leads educational visits Visit Leader (VL) training is recommended.

### **Assessment of Leader Competence**

The NG provides clear advice regarding the assessment of leader competence.

All leaders and their assistants must be formally assessed as competent to undertake the responsibilities they have been assigned in line with NG. For general visits, it is the responsibility of the school/service manager, Headteacher or person delegated to approve visits to ensure that competency checks have been made to ensure the visit leaders and assistants can plan, deliver and supervise educational visits effectively and safely.

For educational visits which fall into the adventurous or additional risk activities category (see section 8 below) leaders should have additional NGB qualifications to allow them to lead effectively.

For further information, please refer to the NG document "[Legal framework and employer systems](#)".

## **6. Guidance and Training for Employees**

As the employer, SCC is required to ensure that its employees are provided with guidance and information relating to LOtC and Educational Visits:

1. Guidance for the management of outdoor learning and LOtC in Staffordshire is the Outdoor Education Adviser's Panel 'National Guidance' website [www.oeapng.info](http://www.oeapng.info).
2. The relevant training courses recommended in Staffordshire are:
  - Educational Visits Coordinator (EVC) training which is **mandatory** for all EVCs in maintained schools in Staffordshire.
  - Visit Leader (VL) training – this course is **strongly recommended** for all those who lead LOtC activities.
3. Suitable systems and processes to ensure that those trained are kept updated.
4. Access to advice, support and further training from appointed professional advisers. SCC has commissioned Entrust to provide an Educational Visits Advisor (EVA) to provide advice and guidance on educational visits to maintained schools and services.

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

### **EVOLVE**

SCC requires all maintained schools and services to use the online system EVOLVE for notification and approval. Entrust provide access to EVOLVE via their Educational Visits and Guidance SLA.

A key feature of EVOLVE is that visits and LOtC activities requiring formal EVA acknowledgment can be brought to the attention of the Entrust EVA. Those visits and activities not requiring EVA acknowledgment may also be viewed sampled or monitored using the database and diary facilities of the system.

### **Approval of Visits**

SCC requires headteachers/service managers to formally approve ALL off-site educational visits and LOtC activity taking place in accordance with these Management Arrangements and OEAP guidance.

It is the responsibility of the approving person and the governing body or management board to ensure the safety and wellbeing of the participants taking part in the visit.

Although approval is delegated, establishments **MUST** additionally notify Entrust's Educational Visit Advisor in advance, of any higher risk visits and activities planned (before booking) which involve any of the following:

- An overseas visit.
- A residential or overnight stay (at home or abroad).
- An adventurous activity.
- Any higher risk visits and activities as follows:
  - Multi Activities (including those delivered by external providers)
  - Abseiling
  - Air Activities (excluding commercial flying)
  - Open Country activities (beyond 30 mins of nearest refuge and above 500m)
  - Camping
  - Paddlesport Activities including canoeing, kayaking, stand-up paddle boarding
  - Coastering / Coast Scrambling / Sea level traverse
  - Duke of Edinburgh Award Expeditions and training (including walking, cycling, canoeing and horse riding)
  - High level Ropes Courses
  - Hill Walking and Mountaineering
  - Horse Riding
  - Motorsport, all forms including Karting and Quad trekking
  - Mountain Biking
  - Rafting/Improvised Rafting
  - River / Gorge Walk / Scramble
  - Rock Climbing including natural rock and man-made indoor or outdoor walls
  - Sailing / Windsurfing
  - Kite surfing / buggying
  - Shooting including air, clay, laser tag sports, paintball and airsoft
  - Archery
  - Skiing including skiing Indoor and dry slope
  - Snowboarding

- Snorkelling and aqualung diving
- Swimming all forms excluding UK Public Pools
- Use of powered safety craft
- Water skiing and wake boarding
- Trampoline parks
- Field work in Coastal, River and upland locations
- Any other activity which has additional risks.

This notification includes any activities being delivered by external providers or approved competent establishment leaders, even those who hold the required NGB qualifications.

### **Regular and Repeated Educational Visits**

For regular visits such as weekly swimming or sporting fixtures, a blanket form can be completed on EVOLVE to cover all visits. It is suggested that these are done on a termly basis and all the details on there must be shared with any staff involved.

For PE activities, only the journey to and from the venue is covered by OEAP guidance. The organisation of the activity itself should be as required or recommended by specialist PE guidance, such as the Association for Physical Education (AfPE).

In addition, blanket forms should be used to cover regular visits in the local area such as visits to local places of worship, libraries and local parks.

## **8. Planning and Evaluation**

Planning for any educational visits should ensure:

- The plan is based on establishment procedures, National Guidance, information in EVOLVE and these Management Arrangements. See also section 9. Risk Management below.
- All staff (including any adult volunteer helpers), and the people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk assessment process.
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained.
- Designated emergency contact(s) have been identified that will work on a 24/7 basis where required and that all details of the activity provision are accessible to the emergency contact throughout the period of the activity.

For further information refer to NG “Good Practice” document.

<http://oeapng.info/downloads/good-practice>

## **9. Risk Management**

Suitable and sufficient risk management systems must be in place as part of planning for educational visits.

The risk assessment of an activity should be balanced by the benefits to be gained from participating. The Health and Safety Executive (HSE) endorse this approach through their ‘Principles of Sensible Risk Management’ and advocate that it is important that people are exposed to well-managed risks so that they learn how to manage risk for themselves.

Schools/services must produce their own risk assessments for any educational visits. A risk assessment should be recorded and suitable and sufficient control measures must be identified and implemented. The results of any risk assessment must be communicated to all staff, participants, parents and pupils as appropriate. Templates and examples of risk management materials can also be accessed through EVOLVE and training is provided during the Entrust EVC and VL courses.

For further information, please refer to the NG document: [Risk Management Overview \(Document 4.3c,f,g\)](#)

## **10. 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 people. It is a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. School/service arrangements should clarify the circumstances where a preliminary visit is a requirement. If this is not possible then the use of brochures, websites and previous knowledge from past visits or other establishments should be considered. The schools/services arrangements should clarify when preliminary visits are required along with any information required from the provider.

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:

- Learning Outside the Classroom (LOtC) Quality Badge
- Adventure Activities Licensing Service (AALS) licensing
- Adventuremark
- National governing body (NGB) centre approval schemes (applicable where the provision is a single, specialist activity).
- AHOEC Gold Standard

Use of non-accredited providers is possible for some adventurous and additional risk activities as some of these activities do not fall within the above accreditation schemes.

If activities that are being provided fall within the scope of AALS licensing, then the provider used must have a licence.

If they do not fall within this scheme the providers are required to complete an EVC1 – Activity Provider Checklist. This must be completed and signed by the provider and added to the EVOLVE visit form. A new EVC1 form is not required for each visit as long as the information on the form refers to the activity being carried out. If the provider has not been used within 6 months, then they should be contacted to see if the information on the EVC1 is still correct.

If using a provider for residential accommodation including campsites used for more than one night, then the provider must complete and EVC2 Accommodation Provider form. The procedures in the previous paragraph apply if the venue is used on subsequent occasions.

Both EVC1 and EVC2 forms can be downloaded from the Visit Form Section in the Resources Tab on EVOLVE.

## **11. Requirements to Ensure Effective Supervision**

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 a proper consideration of:

- Age (including the developmental age) of the group.
- Gender and 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 experience and competence.

When calculating ratios for groups, the establishment must ensure that there is sufficient competent staff to effectively supervise the group during all aspects of the visit. Staff from external visit providers should not be included in the supervision ratios as they may not be present for the whole visit.

When using external providers, they hold the responsibility for delivering the activity and ensuring the safe delivery of that activity. School/service staff are required to supervise in a pastoral capacity during these periods. For periods such as downtime, transport and any other periods when the student are not directly instructed by the provider, the direct supervision of the students becomes the responsibility of the School/service staff so clear and effective supervision plans must be in place and understood by all parties.

It is the school's/service's responsibility to devise and implement a procedure regarding alcohol consumption by staff and students. This procedure must be written down and shared with all parties such as the school, staff, providers, students and parents. All parties should agree to this procedure. It is essential that staff can maintain effective supervision at all times and that the laws regarding alcohol consumption in the country visited are followed.

## **12. Vetting and Disclosure and Barring Service (DBS) Checks.**

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

For the purposes of these Management Arrangements:

- Frequently is defined as once a week or more.
- Intensively is defined as four days or more 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 young or vulnerable people.

In addition, any safeguarding policies and procedures in place at the school/service must be followed. These may include specific local procedures but also those supported by SCC for maintained schools/services.

### **13. Inclusion and Equality**

Every effort should be made to ensure that Educational Visits and LoTC activities 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 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.

Schools/services 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 local policies, thus ensuring an aspiration towards:

- An entitlement to participate;
- Accessibility through direct or realistic adaptation or modification;
- Integration through participation with peers.

### **14. Transport**

Providing transport for off-site activities and educational visits must be an integral part of the planning process.

The visit leader should ensure that coaches and buses are hired from a reputable company. When school/service staff are driving minibuses, SCC employed staff must have a valid Minibus Assessment, non SCC employees must be verified as competent by the school/service.

Transporting people in private cars must form part of the planning and risk assessment process and where this occurs, there should be recorded procedures. It is the school's/service's responsibility to ensure that the appropriate checks have been made on both the driver's experience and qualifications and that the vehicle to be used has the appropriate level of insurance, road tax and a valid MOT.

The level of supervision on any transport should be considered as part of the risk assessment process when planning the journey.

### **15. Emergency Planning and Critical Incident Support**

All schools/services must have a clear Emergency Plan in place to deal with Critical Incidents. Please refer to the NG document which discusses all aspects which should be considered when devising this plan. [Good Practice- Critical Incident Managements \(Section 4 Documents\)](#)

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

- Suffered a life threatening injury or fatality;
- Is at serious risk;
- Been missing for a significant and unacceptable period.

All members of the school/service including visit staff, leadership team and governors should be aware of this plan and how to implement it.

### **Action to take when a critical incident occurs**

1. In the first instance the school/service should refer to its Visit Emergency Plan and Business Continuity Plan.
2. If the level of incident is beyond the coping mechanisms of the above plans, then schools/services should contact SCC.

The 24 hour Emergency number for SCC is **07623 910065**. In the unlikely event that the SCC Director on call does not get back to you within a reasonable time period, then contact should be made with the Staffordshire Civil Contingencies Unit's Duty Officer. This can be done by calling **08451 213322**. This number will put you through to Fire Control. Please ask Fire Control to page the CCU Duty Officer, leaving an appropriate message

In addition to the school/service contact numbers these numbers should be carried by leaders at all times during an off-site activity which runs beyond normal office hours or during weekends. In the first instance staff should contact their school/service emergency contact numbers and then their staff should use the above numbers if required. **Under no circumstances should these numbers be given to young people/service users or to their parents or guardians.**

### **16. First Aid and Accident Reporting**

There is no legal requirement that all visits have a fully trained first aider on the visit leader team but this should be considered as good practice.

First aid training should be appropriate for the activity and environment the group are operating in. Any staff who are leading adventurous and additional risk activities must have valid and relevant first aid training, which is also required in order to validate any National Governing Body (NGB) qualifications they may hold.

When using a provider, checks should be made regarding the level of first aid provision.

For visits either abroad or some distance from the establishment, visit leaders must ensure they know the location of additional first aid assistance and how to summon it if required. This must be part of the planning and emergency procedures process. Guidance can be found at: <http://oeapng.info/downloads/good-practice>

All accidents that involve anyone – employees, pupils, service users, contractors or members of the public when engaged in SCC activities are to be recorded, investigated and reported in line with SCC's Accident Management Arrangements.

### **17. Monitoring**

Employers must ensure that any procedures in place to manage educational visits and LOtC are effectively monitored. SCC will check that off-site visit arrangements are in place through the Health, Safety and Wellbeing Audit process, however, the main monitoring role within schools/services is delegated to headteachers/managers and their EVCs.

SCC will receive management information from Entrust regarding compliance with the use of EVOLVE and implementation of these Management Arrangements.

Schools/services and their EVCs should ensure that appropriate systems are in place for monitoring offsite visits. Monitoring should include checks on procedures, training, reviews following visits and sampling (field observation), to check that procedures are followed during visits. Records of any monitoring including field monitoring carried out by the establishment should be retained by the establishment.

Further information on monitoring is available in the National Guidance documents:  
<http://oeapng.info/downloads/legal-framework-and-employer-systems>

## **18. Insurance for Off-Site Activities and Visits**

Employer's Liability insurance and Public Liability insurance are a statutory requirement and all establishments must have appropriate insurance in place which includes appropriate indemnities for both employees and non-employees.

Limited Personal Accident insurance is provided for all SCC employees in the course of their employment, providing predetermined benefits in the event of an accident in respect of qualifying injuries. Visit leaders should be advised that they should consider taking out less limited personal accident cover privately, or obtain cover through a professional association. The optional School Journey Scheme (not applicable for Academy schools who should refer to their own insurers) gives benefits that exceed those of most tour operators and provides a phone number giving rapid access to support and assistance in the event of a claim. When providers are used it is a requirement for them to hold Public Liability insurance cover with a minimum limit of indemnity of £5M.

For further information and advice on insurance matters please contact the school's insurance provider or for SCC services/maintained schools: Ian Gough Risk & Insurance Manager, Insurance Services, Staffordshire County Council  
Email [ian.gough@staffordshire.gov.uk](mailto:ian.gough@staffordshire.gov.uk) Tel 01785 276476

## **19. Charges for Off-Site Activities and Visits**

Governors, Trustees, Headteachers, Managers, Curriculum Planners, EVCs and Visit Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449-462 of the Education Act 1996. For further information, please refer to NG document: Charging for School Activities.

## **20. HSW Supporting Information**

Management Arrangements for:

- Risk Assessment
- Accident and Incident Management

Minibus Driving

Business Continuity Planning

EVOLVE