



Policies and Procedures  
Management of  
Learning Outside the  
Classroom (LOtC) /  
Offsite Visits and Activities

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# Abbey Multi Academy Trust (Abbey MAT) Policy for the Management of Learning Outside the Classroom (LOtC) / Offsite Visits and Activities

## 1 Introduction

## 2 Rationale

Safely managed educational visits with a clear purpose are an indispensable part of a broad and balanced curriculum and a vibrant part of the academies within the Abbey Multi Academy Trust (Abbey MAT). They are an opportunity to extend pupils' learning and enrich their appreciation and understanding of themselves, others and the world around them. They can be the catalyst for improved academic performance, contextual understanding, a lifetime interest or in some cases professional fulfilment. They are to be encouraged.

## 3 Purpose

1. To ensure that every pupil has the opportunity to benefit from education visits.
2. To ensure all visits are safe, purposeful and appropriate to meet educational needs of pupils taking part.
3. To enable the school to identify appropriate functions, responsibilities, training, support and monitoring for all Governors, Principal, staff, helpers, pupils and providers involved in education visits.
4. To comply with AMAT Policy for the Management of Learning Outside the Classroom / Offsite Visits and Activities and keep up to date with further advice.
5. To meet DfE Health and Safety advice
6. To ensure where appropriate further advice is sought from AMAT and other technically competent personnel.

## 4 Provision of Employer Guidance

AMAT has formally adopted the *Outdoor Education Advisers' Panel National Guidance (OEAP NG or National Guidance)* as "AMAT Employer Guidance". This OEAP National Guidance can be found on the following web site:

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

AMAT employees are strongly advised to read this policy in conjunction information from the [www.oeapng.info](http://www.oeapng.info) website.

Some key documents are hyperlinked from OEAP NG to this policy for convenience. However, all involved should read and ensure they understand the information relating to their role in the National Guidance.

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

If any advice differs between the AMAT Policy and the OEAP NG recommendations, the AMAT policy will take precedence.

All planning must also reflect the AMAT internal requirements detailed in any relevant AMAT Standard Operational Procedure (SOP) documents.

Where AMAT employees commission LOTC activity, they must ensure that such commissioned agent has either:

a) adopted AMAT policy or OEAP National Guidance

or

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

## 5 Scope and Remit

The OEAP NG 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;
- 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 OEAP NG document: "[\*Underpinning Legal Framework\*](#)"

## 6 Ensuring Understanding of Basic Requirements

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

- appropriate Policy relating to visits and LOTC activity;
- employer-led training courses to support the Policy 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 Consultants that have proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

Appropriate members of the LGB and/or Trust Board should take part in relevant training that prepares them for the responsibilities they hold for the management of Learning Outside the Classroom/Offsite Visits and Activities. A record of training should be kept by the EVC.

- The relevant training courses for AMAT employees are: Educational Visit Coordinator (EVC) Training - If the establishment does not have a nominated EVC, then that role will by default rest with the head or manager of establishment.
- Educational Visit Coordinator (EVC) Revalidation - the establishment is required to ensure that their EVC undertakes a formal revalidation/updating at least every three years.
- Visit Leader Training – this course is compulsory for all those who lead LOtC activities and is a requirement of AMAT leaders from September 2015. Currently there is no revalidation requirement. However, to meet OEAP NG requirements regarding leader competence, leaders must be current in their knowledge of good practice, so update/refresher training is required/strongly recommended. The EVC can provide or facilitate such update as required. Regular monitoring of visits may also flag a need for further training.

Where an employee experiences problem finding appropriate information, require clarification or further help and guidance, they should contact their establishment's Educational Visits Coordinator (EVC) who will be supported by the Outdoor Education and Educational Visits Consultant nominated by their employer.

The nominated Consultant for AMAT is:

Dave Barham  
DBC Ltd

## 7 Approval and Notification of Activities and Visits

AMAT uses an online database system for record keeping and approval called Evolve.

### Visit Leaders must gain both Initial Approval and Formal Approval

**Initial Approval** - this represents agreement that the Visit Leader may start the detailed planning and enter it on the Evolve system - planning may require time and budget, both of which must be agreed with the Principal.

Process:

- (1) Meet with Vice Principal, obtain signed Initial Approval Form confirming date(s)

(2) Give Initial Approval Form to Principal. For visits other than **residential or Trips abroad which must be agreed by the Executive Principal** who will consider the proposal, possibly consult with Chair of Governors and sign the Form confirming Initial Approval if appropriate.

**Formal Approval** - this is given by the Principal or Executive Principal via Evolve and is the only method that confirms a visit may take place

Process:

- (1) Visit Leader to complete all detailed planning and enter on Evolve
- (2) EVC to check submission detail on Evolve and forward to Principal or Executive Principal according to the sort of visit proposed if all planning detail is appropriate
- (3) Principal or Executive Principal will give Formal Approval via Evolve if all detailed planning appropriate

### ***NO VISIT CAN TAKE PLACE WITHOUT FORMAL APPROVAL VIA EVOLVE***

All visits should be entered by the Visit Leader and submitted for Initial Approval **at least four (4) weeks prior** to the day of the visit wherever possible. However, in the case of complex visits such as a residential or visit abroad, it is essential that Initial Approval is sought before any contract is signed with the provider and before any financial transactions are made, as such pre authorisation must be sought at least **twelve (12) weeks prior** to the visit and may need to be completed many months before the visit

Any AMAT SOP for the signing of contracts on behalf of AMAT must be followed.

The contract for any AMAT commissioned visit/offsite activity must rest between AMAT and the contractor (ie the provider) and not parents.

A facility exists on Evolve for multiple visits of the same type to be applied for and given Formal Approval as part of a rolling programme of activity over a period of time e.g. sports fixtures, swimming etc.

The nominated EVC for

**Abbey Grange Academy are:**

Dawn Harding, Wendy Hirlam and Faye Wiggins

**Lightcliffe Academy is:**

Louise Cuthbert

**St Chad's Primary School is:**

Steve Swales

## **8 Risk Management**

AMAT has a legal duty to ensure that risks are managed - requiring them to be reduced to an "acceptable" or "tolerable" 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 AMAT 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. AMAT uses 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. However, AMAT policy requires all staff to adhere to the process adopted by the establishment.

Generic assessments, risk management materials and advice are available on the school intranet.

***It is the responsibility of the Visit Leader to carry out a full risk assessment of the visit and produce a written record of significant findings.*** The Visit Leader must adapt all appropriate generic risk assessments where necessary to become Event Specific for the visit they are leading. This Event Specific risk assessment must be uploaded to Evolve.

Refer to OEAP NG document: [“Risk Management”](#)

## 9 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;
- gone missing for a significant and unacceptable period.

AMAT is committed to providing emergency planning procedures to support colleagues in the event of a critical incident.

Refer to OEAP NG document: [“Critical Incident Management for Visits”](#)

To activate support from your establishment, the Visit Leader (or in the event of their unavailability, another designated member of the staff team) must contact the AMAT emergency duty staff member using the phone number(s) on the Visits Emergency Card.

This card 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.

## 10 Monitoring

AMAT will ensure that sample monitoring of the visits and LOtC activities is undertaken. Such monitoring will be in keeping with the recommendations of OEAP National Guidance. There is a clear expectation that the monitoring function carried out through systems put in place by the establishment EVC.

Refer to OEAP NG document: [\*"Monitoring"\*](#)

## 11 Assessment of Leader Competence

OEAP National Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of AMAT policy that all AMAT Visit Leaders and their assistants have been formally assessed as competent to undertake their responsibilities - see also 3.3 and 17 in this policy document.

Refer to OEAP NG document: [\*"Assessment of Competence"\*](#)

## 12 Role-specific Requirements and Recommendations

OEAP National Guidance sets out clear and detailed responsibilities and functions of specific roles. These are:

1. Member of Local Governing Body or Trust Board
2. Principal/Executive Principal
3. Educational Visits Coordinator (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 documents headed as above.

## 13 Charges for Off-site Activities and Visits

AMAT 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 NG document: [\*"Charges for Off-site Activities and Visits in an Educational Establishment"\*](#)



## 14 Safeguarding

AMAT 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 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 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 NG document: [\*"Vetting Disclosure and Barring Service \(DBS\) checks"\*](#)

## 15 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:

- age, aptitude, experience (including the developmental age) of the group
- gender issues
- ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics etc)
- availability of prompt outside assistance
- 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
- communication between sub groups

Refer to OEAP NG document: [\*"Ratios and Effective Supervision"\*](#)

Refer to OEAP NG document: [\*"Group management and Supervision"\*](#)

## 16 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. Consultation with the EVC 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 CLOtC Quality Badge
- AALS licensing
- Adventuremark
- Association of Heads of Outdoor Education Centres (AHOEC) Gold Badge
- National Governing Body (NGB) centre approval schemes (applicable where the provision is a single, specialist activity).

Where a provider holds such one of the above accreditations, there should be no need to seek further assurances regarding risk assessments for the activities that the provider is delivering. AMAT will ensure however that Visit Leaders complete a risk benefit assessment and record any significant findings for any aspects of a visit which they are leading or responsible. This will usually include periods and activities that the school staff take responsibility for, transport to and from the venue plus any stops or visits en route.

Refer to: OEAP NG document [\*"Preliminary Visits and provider Assurances"\*](#)

## 17 Insurance for Off-site Activities and Visits

Employer's Liability Insurance is a statutory requirement and AMAT 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. AMAT 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 AMAT employees in the course of their employment, providing predetermined benefits in the event of an accident. The

Policy details are held by the EVC who can provide a copy on request. However, Visit/ Activity Leaders are advised that they should consider taking personal accident cover privately, or obtain cover through a professional association. They should ensure that Assistant Leaders are aware of the extent of this insurance cover.

Visit Leaders should discuss plans with the EVC to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the AMAT insurer.

Refer to OEAP NG document: [\*"Insurance"\*](#)

## 18 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

The EVC 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.

Refer to OEAP NG document: [\*"Inclusion as a Legal Issue"\*](#)

## 19 Adventure Activities Licensing Regulations

The EVC 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 AALS license is an assurance of safety systems. It does not accredit educational or activity quality.

Any requirement by AMAT staff to lead adventurous activities are to be cross referenced with the Adventure Activity Leadership Qualification Matrix to guide and support Initial and Formal Approval decisions made by the EVC and Principal

Refer to OEAP NG document: "[Adventure Activity Licensing Regulations](#)"

## 20 Good Practice Requirements

To be deemed competent, a AMAT Visit 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.

OEAP National Guidance sets a clear standard to which AMAT Visit 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. Establishments should view the original documents and certificates when verifying leader's qualifications, and not rely on photocopies.

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 NG document: [\*“Good Practice Basics”\*](#)

## 21 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 AMAT 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. Consideration should be given to questioning potential transport suppliers on whether:

- the driver(s) to be used will hold a valid and current CRB clearance;
- seat belts will be provided on the vehicle to be used, not all large passenger vehicles have a legal requirement to have seat belts fitted and those that do may only have lap belts (as opposed to 3-point belts) which are only suitable for short journeys;
- they are able to supply (where required) child seats and booster cushions for younger children, otherwise these will need to be supplied by the organiser;
- they possess a valid and recent risk assessment for ‘school day trips/outings’

For further information or advice concerning any of the above, contact AMAT Transport Co-ordinator.

Transporting young people in private cars requires careful consideration and must follow the AMAT SOP. Young people with their own vehicles should not be allowed to drive other young people to visit/activity locations.

Refer to OEAP NG document: [\*“Transport: General Considerations”\*](#)

Refer to OEAP NG document: [\*“Transport in Minibuses”\*](#)

Refer to OEAP NG document: [\*“Transport in Private Cars”\*](#)

## 22 Planning

All planning must reflect the internal requirements detailed in the AMAT Offsite Visits SOP.

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.

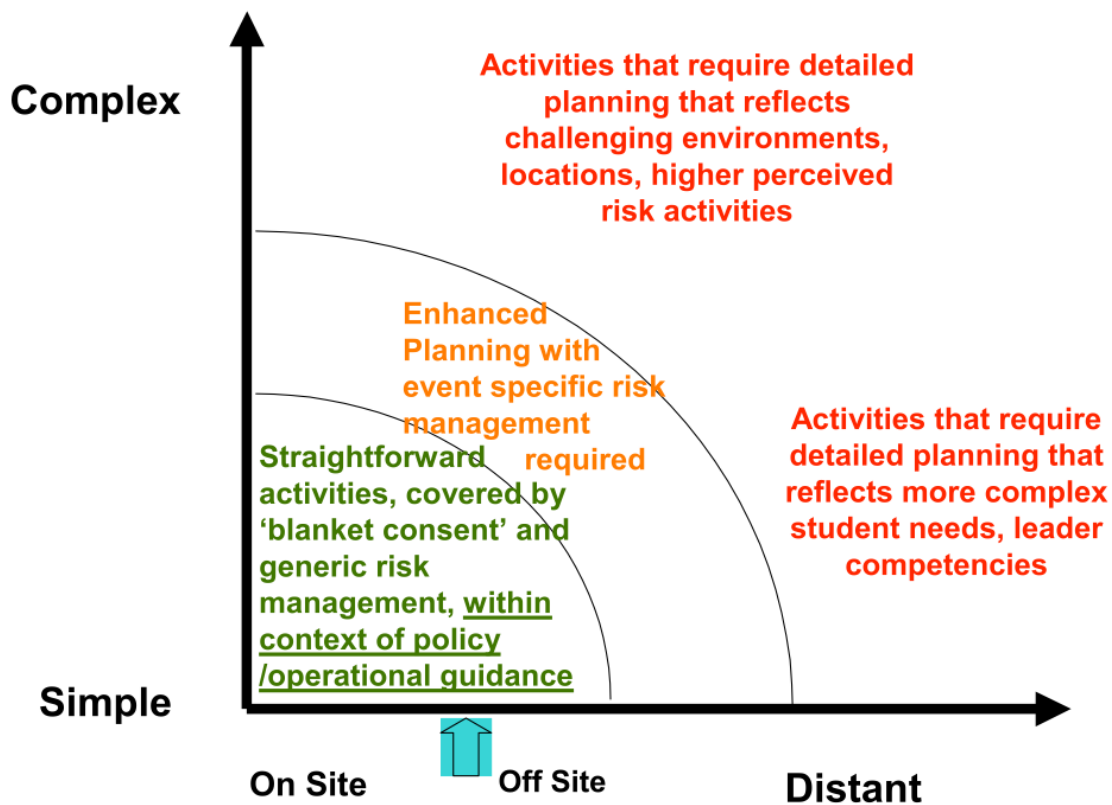
It is strongly recommended that at a very early stage of the planning process, the provisional staffing team carry out a brain storming exercise in order to identify the benefits and learning outcomes that the activity (or range of activities) might or are intended to achieve. If the outcomes are to be evaluated with any rigour (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 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. Consent forms are often used to update parents/carers current phone numbers, contact details plus any medical conditions which have developed since the last check.

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.

- **Staffing requirements** – trained? experienced? competent? ratios?
- **Activity characteristics** – specialist? insurance issues? licensable?
- **Group characteristics** – prior experience? ability? behaviour? special and medical needs?
- **Environmental conditions** – like last time? impact of weather? water levels?
- **Distance from support mechanisms in place at the home base** – transport? residential?



Refer to OEAP NG document: [“Planning Basics”](#)

Refer to OEAP NG Power Point: [“Planning Visits Off-site Activity and LOtC”](#)

## 23 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. The EVC and Visit Leaders are strongly recommended to familiarise themselves with the main content of this report.

Refer to OEAP NG 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 rigour* – i.e. in the way that classroom learning is evaluated – and a methodology to address this is provided within the OEAP National Guidance document: [“Rigorous Evaluation of LOtC: Meeting Ofsted Expectations and Assuring Quality”](#).

Completed: September 2015  
Next Review: September 2017 or earlier if required

Signed:  
Designation:  
Date: