



OUTDOOR EDUCATION & OFFSITE EDUCATIONAL VISITS POLICY

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Roles and responsibilities

Key personnel

Rob Noye (Vice Principal)		
Contact Details	Email	rne@ormistonsixvillages.org.uk
	Telephone	01243 546809
Umbar Sharif (Principal)		
Contact Details	Email	usf@ormistonsixvillages.org.uk
	Telephone	01243 546802
Angela King EVC		
Contact Details	Email	akg@ormistonsixvillages.org.uk
	Telephone	01243 546844
Laura White (Finance & Business Director)		
Contact Details	Email	lwe@ormistonsixvillagesacademy.co.uk
	Telephone	01243 546800

I. Scope and Remit

1.1. This policy and associated guidance (Section 2) applies to Ormiston Academies Trust (OAT) employees, contractors and volunteers whose work involves any one of the following, regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods:

- 1.1.1. direct supervision of young people undertaking experiences beyond the boundary of their normal operational base;
- 1.1.2. facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base;
- 1.1.3. deploying staff who will supervise or facilitate experiences of, or for, young people undertaking experiences beyond the boundary of their normal operational base;

1.2. This policy and associated guidance does not incorporate the following:

- 1.2.1. where academies operate on a split site, the movement of staff and young people between sites;
- 1.2.2. work experience as defined in the publication "Work Experience: a guide for secondary schools" (DfES 2002);
- 1.2.3. Physical Education activities, led by OAT employees, that do not fall within the scope of Adventurous Activities, as defined in the *Employer Guidance* (Section 21). The activity supervision should be that required or recommended by specialist PE guidance, such as that provided by the *Association for Physical Education (AfPE)*. The journey to and from the venue, any Adventurous Activities and activities provided by third parties are covered by this policy and associated guidance.

1.3. As the employer, Ormiston Academies Trust will provide:

- 1.3.1. appropriate guidance relating to off-site visits and activities (2.1, 2.2, 2.4);
- 1.3.2. access to training courses to support the guidance to ensure that it is understood (9.1, 9.2, 9.3);
- 1.3.3. suitable systems and processes to ensure that those trained are kept updated (5.1, 5.2);
- 1.3.4. access to advice, support and further training from appointed Advisers, who have expertise and professional understanding of the guidance, the training and expectations set by current good practice (5.3, 5.4, 5.5).

1.4. The following terms may be used in this policy and associated guidance (2.1, 2.2):

- 1.4.1. **Off-site visits and activities** will include the following that take place beyond the boundaries of the academy site: educational visits; Learning Outside the Classroom (LOtC); outdoor learning.
- 1.4.2. An **Educational Visits Co-ordinator (EVC)** is an appropriately competent OAT employee appointed to ensure that all off-site activities meet the requirements of their employer's policy and guidance, as well as the requirements of academy policy and procedures.

- 1.4.3. A **Leader** is any adult with supervisory responsibilities for young people on an off-site visit;
- 1.4.4. A **Visit Leader** is an accountable person (employed, contracted or a volunteer), engaged through a thorough recruitment process, with overall responsibility for an off-site visit;
- 1.4.5. **Academy** refers to an Ormiston Academies Trust (**OAT**) academy.

See also OEAP National Guidance: **Section 1c: Status, Remit and Rationale**
Section 3.4: Roles & Responsibilities

2. Provision of Guidance by the Employer

- 2.1. OAT *Guidance for Off-site Visits and Related Activities* (referred to as *Employer Guidance*) states the requirements of the employer and links to Ormiston EVOLVE. Where guidance is a recommendation rather than requirement, this will be clearly stated as such.
- 2.2. OAT recognises *The Outdoor Education Advisers' Panel: Guidance for the Management of Outdoor Learning, Off-site visits and Learning Outside the Classroom* (referred to as *OEAP National Guidance*), as the definitive source of best-practice guidance.
- 2.3. OAT employees, volunteers and contractors must follow the requirements of this policy, *Employer Guidance* (2.1), *OEAP National Guidance* (2.2), and relevant academy policies (2.5).
- 2.4. The definitive versions of this policy and *Employer Guidance* (2.1) may be found in the Resources area of the Ormiston EVOLVE website under the [OAT Policy & Guidance] tab. The most up to date version of the *OEAP National Guidance* is available at www.oeapng.info.
- 2.5. All OAT academies are required to have a suitable policy for the management of all off-site visits and related activities, which includes a clear reference to this policy, the *Employer Guidance* and *OEAP National Guidance*. The definitive version of the academy's policy should be available from the [Academy Docs] tab in the EVOLVE Resources area.

For an explanation of legal expectations, all users of this policy are recommended to read the *OEAP National Guidance* document: **Section 3.2a: Underpinning Legal Framework and Duty of Care**

3. Ormiston EVOLVE (<http://oatvisits.net>)

3.1 EVOLVE is a web-based system that provides the following:

- 3.1.1 An online Notification and Approval system for visits;
- 3.1.2 Definitive versions of OAT *Policy & Guidance for Off-site Visits and Related Activities*;
- 3.1.3 Definitive versions of OAT forms and documents, referenced in the *Employer Guidance* and essential for the visit process;

- 3.1.4 Definitive versions of academy forms and documents, essential for the visit process;
- 3.1.5 Best-practice forms and documents that may be adapted by academies to support the visit process;
- 3.1.6 Links to important national documents referenced in the Employer Guidance;
- 3.1.7 Search and Reporting facilities.

3.2 All staff involved in the visit process must be given an appropriate EVOLVE account to enable them to access: key policies; employer and national guidance; good-practice forms and documents; the notification and approval process for visits;

4. Role-specific Requirements

- 4.1. Each academy is required to have an Educational Visits Co-ordinator (EVC) in place who, through experience and training, is appropriately competent to fulfil that role in their academy (see also 9.1.1 and 9.1.2.).
- 4.2. The academy policy for off-site visits and related activities should outline the roles and responsibilities of the key stakeholders in the visit process: Local Governing Body; Principal; EVC; Visit Leader; Leader; Volunteer; those in a position of Parental Authority.
- 4.3. Roles and responsibilities should reflect those detailed in *OEAP National Guidance: Section 3.1b Requirements and Recommendations for Academies*.
- 4.4. Every off-site visit must have a designated Visit Leader. Joint Visit Leaders are not permitted, though, Deputy Visit Leader(s) may be appointed as required.
- 4.5. Academies are required to ensure that all Visit Leaders and Leaders have been assessed as competent and confident to undertake responsibilities they have been assigned in line with *OEAP National Guidance: Section 3.2d Assessment of Competence*.

See also OEAP National Guidance: **Section 3.4: Roles & Responsibilities**

5. Advice and Support

- 5.1. The EVOLVE Resources area contains links and downloadable documents that provide a comprehensive range of information from key sources.
- 5.2. For the purposes of day-to-day updating of information, EVCs and Visit/Activity Leaders are directed to the posting of 'EVC Update', an occasional newsletter, in the EVOLVE Resources area.
- 5.3. Where an employee experiences problems finding specific material, or requires clarification or further help and guidance, they must contact their academy's Educational Visits Coordinator (EVC), in the first instance.
- 5.4. If the EVC is unable to resolve a problem, they should contact the OAT Off-site Visits Adviser.
- 5.5. The OAT Off-site Visits Adviser is:

Ken Hutson
Offsite Education Limited
enquiries@offsite-education.co.uk
01482 632529 / 07748 763368

6. Notification and Approval of Off-site Visits & Related Activities

- 6.1. The OAT procedure for the notification and approval of off-site visits and related activities may be found in Appendix 1. of the *OAT Guidance for Off-site Visits and Related Activities (Employer Guidance)*.
- 6.2. Academies are required to notify and seek OAT approval for the following types of visits, in accordance with the procedure in 6.1: those extending beyond the UK (Overseas); those involving one or more overnight stays (Residential); those involving Adventurous Activities as defined in Section 21 of the Employer Guidance (Adventurous).
- 6.3. OAT will require at least 15 working days notice for visits described in 6.2. The OAT Off-site Visits Adviser should be consulted about such complex overseas visits (e.g. Overseas Expeditions) during the early planning stage and before a financial or contractual commitment is made with any third party provider.
- 6.4. Approval of all other types of visits and activities is delegated to academies.
- 6.5. Academies are required to record, notify and authorise visits and activities described in 6.4, in accordance with the procedure in 6.1.

7. Monitoring

- 7.1. The responsibility for monitoring the implementation of this policy and associated guidance is delegated to academies.
- 7.2. Monitoring should be carried out through systems put in place by the academy Principal and EVC in accordance with *OEAP National Guidance: Section 3.2b Monitoring*.
- 7.3. OAT will monitor selected visits and activities.

See also OEAP National Guidance: **Section 3.2b Monitoring**

8. Risk Management

- 8.1. Risks are expected to be reduced to an acceptable or tolerable level, but not necessarily eliminated. Planning should achieve a rational balance between potential adverse risks and the intended benefits and outcomes of the activity.
- 8.2. Risk management tasks are delegated to academies and are normally carried out by the Visit Leader (and Leaders) with the support of EVCs as required.
- 8.3. Academies should arrange training for staff in risk management, as required. See Section 9.

See also OEAP National Guidance: **Section 4.3c Risk Management**

9. Training

- 9.1. OAT recognises, requires and recommends, as appropriate, the following basic training courses for visit stakeholders:
 - 9.1.1. Educational Visits Co-ordinator(EVC) Training;

- 9.1.1.1. All EVCs should have undergone training (min. 6 hours) from an OAT approved provider which includes the OEAP core messages for EVCs as a minimum;
- 9.1.1.2. Where the training was not provided by OAT, full details of the course completed must be presented to the OAT Off-site Visits Adviser for approval and record-keeping purposes;
- 9.1.1.3. Where the training will not be provided by OAT, the course must be authorised in advance by the OAT Off-site Visits Adviser.
- 9.1.2. EVC Update Training;
 - 9.1.2.1. Update training (min. 3 hours) should be completed by EVCs at least every 3 years following full EVC training (9.1.1);
 - 9.1.2.2. Update Training is subject to the provisions outlined in 9.1.1.1, 9.1.1.2 and 9.1.1.3.
 - 9.1.2.3. EVCs will also be kept up to date on an *ad hoc* basis by the OAT Off-site Visits Adviser via mailings and/or meetings.
- 9.1.3. Leader Training;
 - 9.1.3.1. Leaders are required to be appropriately competent to fulfil their responsibilities. This will require them to be current in their knowledge of good practice and be able to apply it when planning and leading visits.
 - 9.1.3.2. Leaders and particularly Visit Leaders are recommended to complete Leader Training (min. 6 hours), from an OAT approved provider, which includes the OEAP core messages for those leading off-site visits and activities.
 - 9.1.3.3. Leader Training is subject to the provisions outlined in 9.1.1.2 and 5.1.1.3.
 - 9.1.3.4. The following training courses are also recognised for Visit Leaders in certain visit contexts:
 - Off-Site Safety Management, OSSM (Royal Geographical Society, RGS) – recommended.
 - Snowsports Course Organisers award, SCO (Snowsport England) – required (see Employer Guidance section 25)
 - Overseas Expeditions and Fieldwork Training (RGS) – recommended.
- 9.2. Identification of training needs and provision of appropriate training courses is delegated to academies;
- 9.3. Further advice and information relating to training for off-site visit stakeholders may be obtained from the OAT Off-site Visits Adviser.

10. Insurance

- 10.1. Academies purchasing insurance through the OAT Service Agreement are automatically insured for Personal Accident and Travel insurance;
- 10.2. Employer's and public liability policies are fully operative to indemnify the academy in the event of personal injury claim being brought against the academy;
- 10.3. Academies should be aware of the limitations and exclusions stated in the policy and should arrange additional cover if necessary;

- 10.4. Academies should not purchase insurance cover from third parties for activities and events that are already covered by the OAT policy;
- 10.5. Further information regarding insurance can be obtained from: Zurich.

See also OEAP National Guidance: **Section 4.4c Insurance**

11. Critical Incident Management and Emergency Procedures

- 11.1. Academies should have procedures in place to deal with incidents occurring on visits (see *Employer Guidance* Section 27).
- 11.2. An incident where events are beyond the normal coping mechanisms and experience of the Visit Leaders and accompanying Leaders (Critical Incident) will require immediate support from the academy Emergency Contacts and implementation of the academy Emergency Procedures. All staff involved in visits must be familiar with these procedures which should be tested annually.
- 11.3. Where an academy's emergency response capability is unable to cope; where an incident involves serious injury or fatality or where it is likely to attract media attention, assistance should be sought from OAT using the OAT Emergency Contact (24 hour number) from the 'Contacts' page of the *Employer Guidance*.
- 11.4. Academy managers must ensure they meet the requirements of the RIDDOR regulations and good practice.

See also OEAP National Guidance: **Section 4.1b Emergency Planning, The Academy's Role;**
Section 4.1c Emergency Procedures for Visit Leaders