

# PERRYFIELDS PRIMARY PRU



## OFF SITE VISITS POLICY

<b>Review Date</b>	<b>Reviewed Date</b>	<b>Reviewer</b>	<b>Action</b>
<b>September 2017</b>	<b>October 2017</b>	<b>Staff</b>	<b>Ratified by Management Committee 17.10.2017</b>
<b>September 2019</b>	<b>October 2019</b>	<b>Staff</b>	<b>Ratified by Management Committee 22.10.2019</b>

## 1. Provision of Employer Guidance

Perryfields Short Stay School has formally adopted “**OEAP National Guidance**” as “**Perryfields LOtC and Visit Guidance**”. This guidance is endorsed by HSE and a number of professional associations and can be found on the following web site:

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

It is a legal expectation that employees **must** work within the requirements their employer’s guidance and WCC has formally adopted the OEAP guidance (as above); therefore Perryfields staff must the follow the requirements of “OEAP National Guidance”, as well as the requirements of this Policy Statement.

Staff should also follow OEAP NG recommendations.

Where a member of the Perryfields staff commissions off-site activity, they must ensure that such commissioned agent has either:

1. adopted OEAP National Guidance

or

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

## 2. Scope and Remit

The OEAP NG document clarifies the range of employees whose work requires them to use the guidance. In summary, it applies to employees whose work involves any one of the following:

- direct supervision of young people undertaking experiences beyond the boundary of their normal operational base;
- direct supervision of young people undertaking experiences that fall within the remit of Learning Outside the Classroom;
- facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base;
- deploying staff who will supervise or facilitate experiences of or for young people undertaking experiences beyond the boundary of their normal operational base;

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

## 3. Ensuring Understanding of Basic Requirements

Perryfields ensure that its staff are provided with

- appropriate guidance relating to visits and LOtC activity;

- employer-led training courses to support the guidance to ensure that it is understood;
- suitable systems and processes to ensure that those trained are kept updated;
- access to advice, support and further training from appointed Advisers that have proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

The appropriate guidance for the management of outdoor learning and visits in Perryfields Short Stay School is the OEAP National Guidance web site.

The relevant training courses are:

1. OEAP-accredited Educational Visit Coordinator (EVC) Training – Perryfields must have a current EVC in post.
2. Educational Visit Coordinator (EVC) Revalidation – Perryfields requires that their EVC undertakes a formal revalidation within the recommended period (usually 3-4 years).
3. OEAP-accredited Visit Leader Training – this course is a requirement of Perryfields Visit Leaders. While there is no revalidation requirement, to meet OEAP NG guidance requirements regarding leader competence, leaders must be current in their knowledge of expectations of good practice - update refresher training on a 3-5 year basis is the HSE recommendation and is therefore strongly recommended.

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

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

**The nominated adviser for Perryfields Short Stay School is:**

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

**Telephone: 01239 654571**

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

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

Employer guidance **must** provide clarity on issues where responsibilities and functions are delegated. This is particularly critical in establishing requirements regarding formal notification and formal approval of activities.

WCC has formally delegated the responsibility for formal approval of all visits and off-site activities activity to the Head. It is a requirement of this policy that the Head carries out this function in accordance with OEAP National Guidance and any employer guidance requirements put in place by WCC in their capacity as an employer.

The EVC will notify the LA through the Evolve on-line notification process as required by WCC. In addition, the EVC will notify the appointed B and S adviser of visits and activities falling within any one of the triggers set out below:

- involves a residential or overnight stay;

- involves the provision of an adventurous activity
- involves an activity where the EVC would like further guidance

The above notification procedure requires the Visit Leader to submit a completed B and S F1 form to the EVC. The EVC will then enter the relevant F1 information on form B and S F2 to for submission to the appointed Adviser on a half-termly basis.

## 5. Risk Management

Perryfields staff have a legal duty to ensure that risks are managed - requiring them to be reduced to an “acceptable” level - and not to eliminate risks, as would be a reasonable expectation when risk assessing a piece of machinery, work shop or manufacturing process. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring the school 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. School employees should use a “Risk-Benefit Assessment” approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. This appreciation of the benefits to be gained through participating provides objectivity to a decision that any residual risk (i.e. the risk remaining after control measures have been put in place) is “acceptable”. HSE endorse this approach through their “*Principles of Sensible Risk Management*” and advocate that it is important that young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

There is no legal requirement to produce a risk assessment in a particular format; but there is a legal requirement for the process to be recorded and for suitable and sufficient control measures to be identified for any significant risks i.e. those that may cause serious harm to an individual, or harm several people. Perryfields has adopted a format for recording risk-benefit assessments based on that recommended in EVC Training. An electronic portfolio of exemplar generic risk-benefit assessments, as well as exemplar event-specific assessments using these materials is available to Visit Leaders.

## 6. Visit Emergency and Visit Critical Incident Support

Perryfields is committed to providing visit emergency support procedures to support Visit Leaders in the event of a visit emergency.

## 7. Monitoring

Perryfields requires that there is sample monitoring of the visits and off-site activities undertaken by its staff. Such monitoring should be in keeping with the recommendations of OEAP National Guidance and is principally carried out through systems put in place by the EVC.

## 8. Assessment of Leader Competence

OEAP National Guidance provides specific advice regarding the assessment of leader competence. It is an expectation of this policy that all leaders and their assistants have been formally assessed as competent to undertake such responsibilities as they have been assigned.

## 9. Role-specific Requirements and Recommendations

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

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

Refer to individual OEAP NG documents headed as above.

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

Perryfields staff with visit responsibilities must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996.

## **11. Vetting and DBS Checks**

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

For the purposes of this guidance:

- *frequently* is defined as "once a week or more";
- *intensively* is defined as 4 days or more in a month or overnight.

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

## **12. Requirement to Ensure Effective Supervision**

Staff with a visit leadership role must meet legal and good practice requirements with regard to Effective Supervision. In general terms, the Law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is "effective".

Effective supervision should be determined by proper consideration of:

- 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.

### 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 young people. It is a vital dimension of risk management.

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

It is good practice for Visit Leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available, thus reducing bureaucracy.

Examples of such schemes include:

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

**While OEAP National Guidance takes the view that where a provider holds one of the above accreditations, there should be no need to seek further assurances, WCC Health and Safety Advisers require that leaders obtain copies of Provider risk assessments.**

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

Employer's Liability Insurance is a statutory requirement and WCC 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. The LA 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. LA 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 off-site activities and visits organised by both school employees and volunteer helpers.

Some level of Personal Accident Insurance is provided for all WCC employees in the course of their employment, providing predetermined benefits in the event of an accident. However, Visit Leaders should be advised that they should consider taking out less limited personal accident cover privately, or obtain cover through a professional association.

### 15. Inclusion

Every effort should be made to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender or religion. If a visit needs to cater for young people with special needs, every *reasonable* effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

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

## 16. Adventure Activities Licensing Regulations

The Head, SMT, EVC and Leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated.

The Activity Centre (Young Persons Safety) Act (1995) established the Adventure Activities Licensing Regulations and the Adventure Activities Licensing Authority (AALA), initially responsible to the DfES. The scheme is now the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

The intention of the regulations is to provide a regulatory framework to protect children, parents, teachers and schools when using providers of defined adventurous activities in closely defined environments. The regulations and supporting inspection regime provide a formal process of professional inspection to accredit that providers have effective safety management systems and processes, meeting a national standard.

The definitive source of advice on the Licensing Regulations is to be found in the Health and Safety Executive publication: "**Guidance to the Licensing Authority on Adventure Activity Licensing Regulations 1996**".

Leaders should be aware that the AALA license is an assurance of safety. It does not accredit educational or activity quality.

## 17. Good Practice Requirements

To be deemed competent, a Visit Leader must be able to demonstrate *the ability to operate to the current standards of recognized 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 Perryfields leaders **must** work.

OEAP 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.*
- *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.

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.

## 18. Transport

Careful thought must be given to planning transport to support off-site activities and visits. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it and establishments **must** follow the specialist guidance provided in WCC transport policy. All national and local regulatory requirements **must** be followed.

The level of supervision necessary should be considered as part of the risk management process when planning the journey, giving proper consideration to issues of driver-distraction when considering what supervision is required for the specific group of passengers being transported in a minibus.

The Visit Leader should ensure that coaches and buses are hired from a reputable company.

Transporting young people in private cars requires careful consideration. Where this occurs, there should be recorded procedures.

Staff must record all visits in the office log book leaving numbers of both pupils and staff prior to departure.

## 19. Planning

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.

At a very early stage of the planning process, the provisional staffing team are should carry out a planning exercise in order to identify the benefits and learning outcomes that the activity (or range of activities) might achieve. If the outcomes are to be evaluated with any rigor (an Ofsted expectation), then it will be essential that these outcomes are prioritised, and appropriately targeted. A record of these outcomes will help keep the plan focussed and also be a vital part of the risk management process in providing some objectivity in a “Risk Benefit Analysis”. Once the targeted outcomes have been recorded,



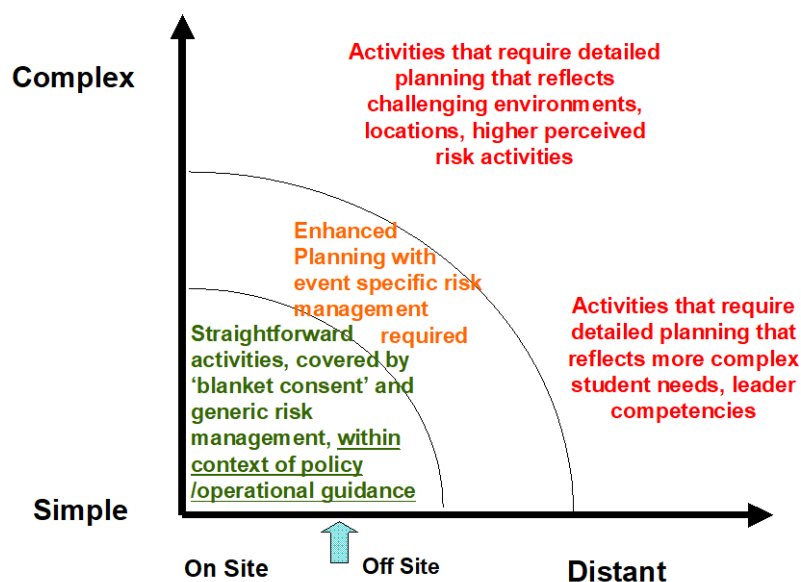
it will then be possible to identify appropriate on-going review and evaluation strategies, including indicators.

To reduce bureaucracy and encourage activity, establishments need to take account of the legalities regarding a requirement for formal consent. When an activity is part of a planned curriculum in normal curriculum time and no parental contributions are requested, then a formal consent is not necessary. However, in the interests of good relations between the establishment and the home, it is good practice to ensure that those in a position of parental responsibility are fully informed.

This supports the move towards developing activity-specific policies at establishment level for regular or routine activities. Such policies should be robust and equate to “*operational guidance*” that makes it clear how the activity should be planned and delivered, meeting all necessary recommendations and requirements, as well as assuring educational quality.

The degree of complexity of a particular plan or policy (along with its supporting procedures) will need to reflect the nature and complexity of several variables that can impact on any given activity. These variables can be remembered as “**SAGED**” as explained below.

- **S**taffing requirements – trained? experienced? competent? ratios?
- **A**ctivity characteristics – specialist? insurance issues? licensable?
- **G**roup characteristics – prior experience? ability? behaviour? special and medical needs?
- **E**nvironmental conditions – like last time? impact of weather? water levels?
- **D**istance from support mechanisms in place at the home base – transport? residential?



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

The Ofsted report "*Learning Outside the Classroom – How Far Should You Go?*" (October 2008) makes statements in the strongest terms to support the value of off-site activities and visits, including the fact that it raises achievement. Governors, Managers, EVCs and Visit Leaders are strongly recommended to familiarise themselves with the main content of this report. However, it also highlights the finding that *even where outdoor learning is highly valued and provided to a high standard, it is rarely evaluated with sufficient rigor* – i.e. in the way that classroom learning is evaluated. It is an expectation of

this guidance document that the organisation and learning outcomes of all visits and off-site activities are properly evaluated.

All staff must complete a post visit evaluation form following any off-site visits. This completed form should be attached to the risk assessment and handed to the EVC.