



## Educational Visits Policy

**This policy follows Oxfordshire Guidance for Managing Off Site Visits and Learning Outside the Classroom Activities – for further information please visit [www.oxfordshireoutdoors.co.uk](http://www.oxfordshireoutdoors.co.uk)**

For the purposes of this policy a visit is defined as:

“Any occasion when a young person takes part in a structured and employee-led learning activity which is carried out beyond the boundary of the normal operational base, with the exception of the following:

- Where establishments operate on a split site;
- Work experience as defined in the publication "Work Experience: a guide for secondary schools" (DfES 2002).

Physical Education: only the journey to and from the venue is covered by Oxfordshire Visits / Employer Guidance. The activity supervision should be that required or recommended by specialist PE guidance, such as that provided by the employer and AfPE.

The statement 'refer to in ***bold italics***' relates to specific sections of the Oxfordshire Visits / Employer Guidance.

### 1. Context: The Provision of Employer Guidance

Oxfordshire County Council has adopted the **OEAP Employer Guidance** as its operating Guidance for the management of Visits and learning Outside the Classroom (LOtC) activities. It will be called **Oxfordshire Visits / Employer Guidance** and as such is the local guidance document.

The **Oxfordshire visits / Employer Guidance** *replaces* the previous guidance document '**Out and About with Oxfordshire 3**'.

The new guidance can be found on the 'Advisory Teacher for EVC information' section of the Oxfordshire Outdoor Learning Service website. The following link is a shortcut :

[www.oxfordshireoutdoors.co.uk](http://www.oxfordshireoutdoors.co.uk)

Other essential information can be accessed from the OCC Health and Safety team.

It is a legal requirement that employees **must** work within the requirements of their employer's guidance; therefore OCC employees must follow the requirements of Oxfordshire visits / Employer Guidance (**National Guidance link on above website**), as well as the requirements of this Policy.

OCC employees are required to follow the guidance as set out in the web version and in this policy.

## 2. Scope and Remit

The Oxfordshire visits / Employer Guidance document (National Guidance link on above website) “**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 individuals 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 Oxfordshire visits / Employer Guidance are strongly recommended to read the document: ***Underpinning Legal Framework***

## 3. Ensuring Understanding of Basic Requirements

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

- appropriate guidance relating to visits and LOtC activity;
- employer led training courses, delivered during normal working hours, 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 employees that have proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

The appropriate reference point for guidance for the management of outdoor learning, visits and LOtC in Oxfordshire is the Oxfordshire visits / Employer Guidance.

**OCC requires all employees to follow the guidance contained in Oxfordshire visits / Employer Guidance and to undertake the following H&S training:**

- a. Oxfordshire Educational Visit Coordinator (EVC) Training (April Guinness)**  
All OCC establishments/settings involved in the delivery of visits / LOtC activities are required to have a current, Oxfordshire trained, EVC in post.
- b. Oxfordshire Educational Visit Coordinator (EVC) Revalidation**

All OCC establishments/settings involved in the delivery of visits / LOtC activities are required to ensure that their EVC undertakes a formal revalidation, currently on a 3 year cycle.

**c. Oxfordshire Visit Leader Training (All teaching Staff)**

It is a requirement of OCC that all employees leading visits / LOtC activities will have undergone appropriate training.

The Oxfordshire visits / Employer Guidance clearly defines Leader competence and how this can be achieved. Managers should ensure that all Visit Leaders meet the requirement of verifiable competence. Attendance on the Oxfordshire Visit Leader training module will provide this competence.

**d. Alternative**

If leaders have not attended the Oxfordshire Visit Leader Training then Managers must establish appropriate alternative equivalent competence for the delivery of visits / LOtC activities

To support EVCs and Visit Leaders OCC will provide access to a website through which updated information and other essential information can be obtained.

This is accessed through the EVC section of the Oxfordshire Outdoor Learning Service (OOLS) website:

[www.oxfordshireoutdoorlearningservice.co.uk](http://www.oxfordshireoutdoorlearningservice.co.uk)

Where an employee experiences problems with finding the material they are looking for, or requires clarification or further help and guidance, they should contact their establishment's EVC. If the EVC cannot resolve the query then contact should be made with:

Jan Harding                      Advisory Teacher Educational Visits  
Hill End Centre  
01865 863510  
[educational.visits@oxfordshire.gov.uk](mailto:educational.visits@oxfordshire.gov.uk)

Kevin Jackson                  Advisory Head Outdoor Learning  
Kilvrough Manor OEC  
01792 232743  
[kjackson.kilvrough@ocnmail.net](mailto:kjackson.kilvrough@ocnmail.net)

**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. Where establishments can demonstrate competence to do so the OCC requirement will be notification of Cat C visits rather than approval

Oxfordshire delegates the responsibility for formal approval of all Visits and LOfC activity to establishment/settings Heads / Managers. It is a requirement of this policy that Heads and Managers carry out this function in accordance with the Oxfordshire visits / Employer Guidance.

Although approval is delegated, establishments must notify OCC of visits and activities falling within the criteria set out below:

- overseas visits (day and residential)
- within the remit of Adventure Activities Licensing
- visits / activities in more remote / demanding settings

The Visit Notification Form should be used for this purpose, which is appended to this policy. The timescales and notification details are all contained on the form.

## **5. Risk Management**

As an employer, OCC has a legal duty to ensure that risks are managed - requiring them to be reduced to an “acceptable” level. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring OCC 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. OCC strongly recommends a “Risk-Benefit Assessment” approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. This appreciation of the benefits to be gained through participating provides objectivity to a decision that any residual risk (i.e. the risk remaining after control measures have been put in place) is “acceptable”. The Health & Safety Executive (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.

Access to relevant materials will be provided on OCC H&S website via training courses and on the EVC section of the OOLS website.

OCC reinforces the legal requirement to produce appropriate risk management strategies and records, ensuring that suitable and sufficient control measures are identified and put in place for any significant risks associated with the visit. Additional support will be provided for example, through the provision of exemplar generic risk – benefit assessments. It is recommended that establishments adopt and adapt these to suit their own needs.

*Refer to guidance document: **Risk Management***

## **6. 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;
- has gone missing for a significant and unacceptable period.
- has suffered acute ill health

As an employer, OCC is committed to providing emergency planning procedures to support establishments in the event of a critical incident.

*Refer to guidance document: **Critical Incident Management for Visits***

To activate support from OCC, the following telephone numbers should be used:

24 hour OCC contact for **major emergencies: 01865 379789 (Fire Service Control)**  
*Ask for County Contact Officer and request appropriate County Council Service*

This number 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 this number be given to young people or to a parent / guardian.

## **7. Monitoring**

As an employer, OCC ensures that there is sample monitoring of the visits and LOtC activities undertaken by its establishments, either by attaching such monitoring duties to its officers, or by delegating these tasks to establishments. Such monitoring should be in line with the recommendations of Oxfordshire visits / Employer Guidance.

There is a clear expectation that the monitoring function is a delegated task, principally carried out through systems put in place by the establishment EVC.

OCC reserves the right, under its legal responsibilities, to directly carry out monitoring and to request evidence of local monitoring.

*Refer to guidance document: **Monitoring***

## **8. Assessment of Leader Competence**

All employees and volunteers must be competent to carry out their defined roles and responsibilities in relation to the visit. The Oxfordshire visits / Employer Guidance provides clear advice regarding the assessment of leader competence and sets a clear standard to which OCC leaders **must** work.

This policy requires Managers to ensure that visit leaders and their assistants are formally assessed as competent to undertake such responsibilities as they have been assigned in line with the Oxfordshire visits / Employer Guidance.

All those 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 employees.

Where a volunteer is a parent or otherwise in a close relationship to 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 and all other personal relationships as part of the Risk-Benefit assessment.

*Refer to guidance document: **Good Practice Basics***

Refer to document: **“Assessment of Competence”**

### **9. Role-specific Requirements and Recommendations**

The Oxfordshire visits / Employer Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within OCC management structures.

*Refer to guidance documents for further detail*

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

OCC Heads/Managers, Curriculum Planners, EVCs and Visit/Activity Leaders 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 guidance document: **Charges for Off-site Activities and Visits in an Educational Establishment***

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

OCC employees 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**

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 and individuals (including specific 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.

However, as an exception to the above, specific guidance prescribes ratios for Early Years. Visit Leaders must follow this where it applies.

Refer to guidance document: ***Ratios and Effective Supervision***

Refer to guidance document: ***Group management and Supervision***

### **13. Preliminary Visits and Provider Assurances**

All visits should be appropriately researched to establish the suitability of the venue and to check that facilities and third party provision will meet group and leader expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people. It is also a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. Establishment policy should clarify the circumstances where a preliminary visit is not 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 LOTC Quality Badge
- AALS licensing
- Adventuremark
- NGB centre approval schemes (applicable where the provision is a single, specialist activity).

**It is OCC policy that where a provider holds one or more of the above accreditations, there should be no need to seek further assurances. It is the responsibility of the leader to ensure they:**

- are conversant with the relevant scheme
- obtain validated confirmation of the accreditation

Refer to guidance document ***Preliminary Visits and provider Assurances***

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

Employer's Liability Insurance is a statutory requirement and OCC holds a policy that indemnifies it appropriately.

Managers are required to ensure that appropriate insurance cover is in place for each visit. This includes public liability; personal accident; belongings; travel etc

Visit leaders need to ensure clarification of the above, this can be via contact with the OCC Insurance team.

The Visit Notification form **must** be submitted as described in that form to ensure OCC insurance for high risk activities.

Refer to guidance document: ***Insurance***

## **15. Inclusion**

Managers must ensure all visits comply with OCC policy for inclusion

*Refer to guidance document: **Inclusion as a Legal Issue***

## **16. Adventure Activities Licensing Regulations**

Managers must ensure that all activities within the scope of these regulations comply with their requirements

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**".

The OCC outdoor centres are providers of "in scope" activities as defined by the regulations, and are appropriately licensed.

*Refer to guidance document: **Summary of Adventurous Activity Licensing Regulations***

## **17. Transport**

Managers must ensure that all transport used complies with OCC policy

*Refer to guidance document: **Transport: General Considerations***

*Refer to guidance document: **Transport in Minibuses***

*Refer to guidance document: **Transport in Private Cars***

## **19. Planning**

Planning should reflect the consideration of legal and good practice requirements.

*Refer to guidance document: **Planning Basics***

*Refer to guidance Power Point: **Planning Visits Off-site Activity and LOtC***

## **20. Value and Evaluation**

Visit leaders must evaluate and record visit outcomes against the original risk benefit assessment. This exercise will inform future planning.