



Offsite Activities & Educational Visits Policy 2013

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Introduction

East Sussex County Council (ESCC) fully recognises the educational and self-developmental benefits of offsite activities and educational visits for young people. The council encourages exploration of the wide range of opportunities available for outside the classroom learning, supported by a policy that clearly identifies what is needed to plan for and deliver a successful trip, whilst keeping bureaucracy to a minimum.

The target audience for this policy is any establishment or function undertaking Hazardous, Residential or Overseas visits as part of its curricular or extra-curricular programme. Key personnel include the Visit Leader, the establishment or function Educational Visit Coordinator, the Head Teacher (or Head of Service in the case of functional services like Youth Support), and designated Governors where applicable.

The owner of this policy is the Director of Children's Services. The policy administrator is the Children's Services Offsite Education Advisor. Contact details for relevant officers within the council are at section 14 below.

This policy replaces the withdrawn document "Offsite Activities and Educational Visits: Regulations and Guidelines – July 2011 Edition", which was based on the government regulations "Health and Safety of Pupils on Educational Visits (HaSPEV)". HaSPEV came into existence in 1998 and was updated almost yearly, but was increasingly seen as too bureaucratic and risk averse. In 2011, Lord Young carried out a review called "Common Sense Common Safety", which aimed to significantly reduce the amount of 'red tape' believed to be restricting offsite activities. The result was that in February 2012, the 150 page HaSPEV regulations were replaced by an eight page guide called "Health & Safety Department for Education Advice on Legal Duties and Powers for Local Authorities, Head Teachers, Staff and Governing Bodies". Subsequently, the National Offsite Education Advisors Panel (NOEAP) received considerable feedback from local authorities, the education system and other users that the new document was not clear on a number of planning and risk management issues and more direction was required. NOEAP has, therefore, produced a [National Guidance](#) document called "Guidance for the Management of Outdoor Learning, Offsite Visits and Learning Outside the Classroom", which achieves the aim of reducing 'red tape', whilst providing an appropriate level of technical and professional guidance for anyone involved in Offsite Trips and Educational Visits

The Guidance has been endorsed by a number of key national organisations (including the National Union of Teachers, the Association for All School Leaders, ASPECT (the union for professionals), the Council for Learning Outside the Classroom and the Independent Outdoor Group), and is being adopted by increasing numbers of establishments. The guidance is also fully compatible with the Offsite Approvals Software solution, Exeant, which has been procured by the Children's Services Department for implementation in January 2013.

By adopting the Guidance, the council can give full assurance that the health and safety of pupils and young people undertaking outdoor activities will be managed effectively and consistently, and that, in conjunction with the expertise of the Offsite Education Advisor and the intuitive Offsite Approvals Software, a high level of support is available for the users of the system.

This policy will be formally reviewed once a year, and in response to legislative change and lessons identified from incidents and near misses as appropriate.

1. Roles – specific requirements and recommendations

1.1 ESCC Role

As an employer and service provider for offsite activities and educational visits, ESCC has a responsibility identified in the National Guidance under **1c Status, Remit and Rationale** and **3.1a Requirements and recommendations for employers**. In summary ESCC will provide:

- **Appropriate Guidance** - National Guidance (<http://oeapng.info/>) and this policy document
- **Training Courses** - to support the Guidance to ensure it is understood – (see section ‘Training Courses’)
- **A suitable system to approve Residential, Hazardous and Overseas Visits** – Exeant Approvals Software: (<https://eastsussex.exeant.co.uk/>)
- **Access to Advice, support and key updates** – Any National Guidance updates and reviews are highlighted in the ‘Updated document’ section of the website. ESCC updates and information will be sent out via a ‘virtual school bag’ or the ‘offsite activities’ section of Czone (click to access)

1.2 Children Services Establishments Roles

OEAP National Guidance sets out clear and detailed roles, responsibilities and functions that specifically relate to most Children’s Services establishments. Ensure you refer to the individual OEAP documents listed below to check you meet the requirements for specific roles and understand the responsibilities those roles hold.

1. Member of Board of Governors / Managing Body
2. Headteacher
3. Manager of an establishment other than a school
4. Educational Visits Coordinator (EVC)
5. Visit or Activity Leader
6. Assistant Visit Leader
7. Volunteer Adult Helper
8. Those in position of Parental Authority

1.3 Assessment of Leader and Assistant Leader Competence

There is clear advice regarding the assessment of leader competence, which is reinforced through EVC training and Visit Leader Training. ESCC has an expectation that Visit Leaders are deemed competent to undertake the responsibilities of the role and that there is an Assistant Leader that is deemed competent to take responsibility if the visit leader is unable to do so. They should be able to demonstrate the ability to operate to the current standards and recognised good practice for that role. All staff and helpers must be competent to carry out their defined roles and responsibilities. It is a requirement that newly qualified Teachers cannot be visit leaders and careful consideration of competence issues is to be applied to newly appointed staff.

The OEAP National Guidance sets a clear standard to which East Sussex leaders **must** work. The guidance states:

A competent Visit Leader requires;

- Knowledge and understanding of their employer’s guidance, supported by establishment-led training. (e.g. EVC Training, Visit Leader Training theory and practical).
- 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.
- The capacity to react effectively and efficiently when things do not go as planned during a visit.
- In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification.

Refer to **‘3.2d Assessment of Competence’** National Guidance and **‘4.3a Good Practice Basics’**

1.4 Monitoring

ESCC will sample monitor Offsite Activities and Educational Visits undertaken by the establishments covered by the offsite approval service. Monitoring will be kept in-line with the recommendations of OEAP National Guidance. ESCC advises EVC's to carryout, or have a system in place to monitor visits.

Refer to OEAP '**3.2b Monitoring**'

2. Using the Offsite Approval Service

It is a legal expectation that employees must work within the requirements of National Guidance, as well as the requirements in this policy. This includes all maintained schools, youth services and academies, independent schools, free schools or other establishments that have brought into the East Sussex Offsite Approvals Service. Using this service means your establishment will record all overseas, residential and visits involving adventure activities through **Exeant** (see section 3). It is strongly recommended that all visits are submitted on the system, although local day visits will not require ESCC approval.

If your establishment is only using the Duke of Edinburgh's approval service, your visits must still comply with this policy document and National Guidance. Only record DofE visits on Exeant, unless you have brought into the whole Offsite Approvals Service. It is a requirement that an individual within these establishments receives EVC training. ESCC will not be responsible for any visits that are organised by an establishment that does not fall under Maintained Schools, Youth Services, or Establishments that have a service level agreement with the ESCC Offsite Approval Service.

Establishments using this service must ensure they have their own offsite visit policy that links to this policy document and National Guidance. It is expected that each establishment will also have an identified Educational Visits Co-ordinator that meets the requirements identified in section **3.1b Requirements for Establishment** of the National Guidance.

It is important that the documents highlighted as **essential reading** on the National Guidance website are read and also those documents that are relevant to your role, that fall under the '**Legal Framework and Employer System**' as these set out the legal expectations.

The establishment has to submit applications for visits requiring ESCC approval **4 weeks** in advance, this includes;

- Visits further than **50 miles** from base
- Visits involving a overnight stay or residential
- Visits that involve the provision of an adventurous activity

It is recommended that within your establishment policy you specify an appropriate timescale for Local non hazardous visits (less than 50miles from base) allowing time for alterations to be made.

3. Exeant Offsite Approvals Software

This is the web based system that ESCC has procured to record and approve offsite visits. Exeant links to National Guidance and includes hyper links to relevant documents to assist in the completion of the online form. The system will notify the EVC and Head teacher of intended visits, allow them to make comments and approve or decline a visit application. Where ESCC approval is required the system will inform the **Offsite Education Advisor**, who will also be able to make comments and approve visits. Schools Governors will have a 'read only' access, so they can get an overview of what visits are taking place.

Visit Leaders will need to upload the following documents to support their application;

- Relevant risk assessments (Down time if residential).
- A completed [provider questionnaire](#) for centres that do not have LOTC Quality Badge

- A Copy of the letter to parents.

Do not send risk assessments for centres that have Learning outside the classroom quality badge, however the visit leader should ensure they have read a copy.

Other documents you may wish to upload could include: expedition route-cards (DofE), trip itinerary, finance records (for establishment use), register.

If your role changes or you move school, it is important to inform the Offsite Education Advisor. The OEA should also equally be informed if the EVC or Head Teacher is off for a prolonged period of time.

There are help documents available on the Exeant website, and ESCC has produced a start up guide available on Czone. [Step By Step Help Guide for Using Exeant](#)

Visits that require ESCC approval cannot complete the visit until approval has been granted.

4. Risk Management

As an employer ESCC has a legal duty to ensure that risks are managed and reduced to an acceptable level. This requires proportional risk management systems to be in place. ESCC provides training, support and resources to help implement this. There are **new risk assessment templates** and example risk assessment forms on Czone that can be adopted and adapted to make the process easier and more consistent. ESCC does not have a requirement for risk assessments to be produced in a particular format, as long as they comply with the **Health and Safety Executive 5 steps to Risk Assessment** model. The Visit Leader must complete and sign the risk assessments, these signatures can be electronic (please sign do not just type name).

An important aspect of a Risk Awareness approach is to take into account the benefits to be gained from participating in a particular activity and weigh them against the risks. This would mean any residual risk (i.e. risk remaining after control measures) is 'acceptable'. HSE endorses this approach and also acknowledges the importance of young people being educated in risk management and taking responsibility for the outcomes of their own actions.

- HSE five steps to risk assessment - [click here](#)
- ESCC risk assessment template – [click here](#)

Please refer to '**Risk Management 4.3c**' section of National Guidance.

4.1 Effective Supervision

There are no legally set ratios to abide with in respect of staff to pupil ratios. The exception is Early Years settings where Ofsted and DfE do prescribe ratios, which are found in the Statutory Framework for Early Years Foundation Stage document found on Czone.

Ratios should be determined by the result of an effective risk assessment, taking into consideration;

- The group – Age, gender, ability, behaviour, Special Educational Needs.
- Staff competencies.
- Environment – location of visit, time of year, remote setting, crowded, easily accessible.
- Activity – skill level, duration, equipment.

ESCC requires all visits to have **one** identified Visit Leader and an Assistant Leader, both of whom should meet the requirements specified by the OEAP National Guidance for these roles. Only in exceptional circumstances, whereby the risk assessment deems it appropriate, can a visit take place with one member of staff (e.g. a park next to the school)

ESCC expects the good practice ratios identified by the OEAP to be used as starting points, therefore for most groups where there are additional needs of the young people, hazardous conditions, remote environments higher ratios will be required.

- Statutory Framework for Early Years Foundation Stage –

Refer to '**3.2d Ratios and Effective Supervision**' and '**4.3b Group Management and Supervision**'

4.2 Vetting and CRB

Employees who work **frequently** or **intensively** with, or **have regular access to** young people or vulnerable adults, should undergo an enhanced CRB check as part of their recruitment process. For the purposes of this guidance:

- **Frequently** is defined as "once per week or more".
- **Intensively** is defined as 4 days or more in a month or overnight.

However, it must be clearly understood that a CRB check (or other vetting and barring procedure), on its own is not a guarantee as to the suitability of an adult to work with any given group of young or vulnerable people.

Refer to OEAP National Guidance '**3.2g Vetting and CRB Checks**'

5. Inclusion

The Equality Act 2010 states that the responsible body of a school must not discriminate, harass or victimise a pupil to whom one of the protected characteristics applies (Disability; Gender reassignment; Pregnancy and maternity; Race; Religion or belief; Sex and sexual orientation) in the way that it affords (or not) the pupil access to a benefit, facility or service. There is a duty to make reasonable adjustments.

Every effort must, therefore, be made to ensure that Offsite activities and Educational Visits are available and accessible to all: reasonable and practicable measures should be made to include all young people. The principles of inclusion should be clearly reflected in the establishment's policy.

Refer to OEAP National Guidance '**3.2e Inclusion**'

Further support can be found [Equality and Human Rights Commission](#)

6. Charging for Visits

There is a legal framework relating to charging for visits, voluntary contributions and remissions that Heads/Managers, curriculum planners, EVC's and Visit Leaders must take account of. These are set out in the Education Act 1996 sections 449-462.

Refer to '**3.2c Charges for Off-site Activities and Visits in an Educational Establishment**'

7. Insurance

7.1 School Journey Insurance

School Journey Insurance is required for Offsite Activities and Educational Visits. This can be purchased either on an ad hoc basis via the ESCC Claims Administrator (details in section 14), or is covered by the purchase of BLOCK insurance through the ESCC provider. Academies, Free Schools and Independent Schools will need to purchase their own insurance. It is important to ensure the visit leader, EVC, Head or Manager is aware of any exemption the insurance policy has as this may restrict some visits/activities from taking place, and what elements of recovery and repatriation are covered.

ESCC Insurance has set the following exemptions. However new activities are created and introduced regularly, so if in doubt please check with the Offsite Education Advisor.

- Hang gliding, paragliding or parascending.
- Microlighting.
- Paintballing other than when paint balls are aimed at targets.
- Parkour (free running).
- Tombstoning.
- 'Go Ape' high ropes activity.

ESCC Czone homepage for insurance [click here](#)

Refer to OEAP National Guidance '**4.4c Insurance**' and '**Insurance update**' on Czone.

7.2 Public Liability Insurance

The requirement for £10 million public liability exists where external contractors / service providers are providing a service to the schools, or is a centre providing hazardous activities.

It is not a requirement for non hazardous activities providers to hold £10million Public Liability Insurance, as long as £1million Public Liability cover is in place. The level of Public Liability Insurance in place should be identified within the risk assessment for the trip. For example, a local bowling alley would not necessarily hold £10 million public liability insurance but would be acceptable to visit.

It is a requirement for providers of hazardous activities to hold £10million public liability.

8. Adventure Activities Licensing Regulations

Employers, Heads/Managers, EVC's 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 Licensing Regulations and Adventure Activities Licensing Authority (AALA), which was initially responsible to the former Department for Education and Schools. The scheme is now the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

The Activities covered by the scheme are: Caving, Climbing, Trekking and Watersports. 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 can be found in the HSE publication '[Guidance to the Licensing Authority Activity Licensing Regulations 1996](#)',

Refer to OEAP National Guidance '**3.2f AALA Licensing**'

9. Planning a Visit

9.1 Pre-visits and Choosing a Provider

ESCC strongly recommends pre-visits wherever reasonably practicable, particularly of unfamiliar site as a vital dimension of risk management. Pre-visits enable the Visit Leader to assess the provider to see if they have suitable venue, facilities and programme. It also allows the Visit Leader to familiarise themselves with the environment noting, hazards, location of facilities and assess the requirements for effective supervision. The cost of a pre-visit can be incorporated into the total cost of the visit.

There are National accreditation and provider assurance schemes that the OEAP acknowledges and recommend as a sign of quality assurance.

ESCC is no longer using an internal approval system (approved providers list) for providers of hazardous activities and is using the Learning Outside the Classroom (LOtC) Quality Badge as a benchmark for assurance of safety and quality. Details of the LOtC quality badge and the database of providers can be accessed via www.lotcqualitybadge.org.uk

Those providers that are ESCC approved will still be valid until their approval has expired. Any queries should be directed to the Offsite Education Advisor.

ESCC requires providers of hazardous activities to hold the Learning Outside the Classroom quality badge and to have £10million public liability; no further assurance is required. However, it is important to check the provider's ethos matches your expectations and whether the provision meets the needs of the group. Clarification on supervision and 'down time' arrangements should be obtained.

If a provider does not hold a LOtC quality badge then it is a requirement for an OEAP National Guidance '**Provider Statement**' to be completed and uploaded as part of the approval process.

ESCC recommends that for non hazardous activities the LOtC Quality Badge is still used for quality assurance, and where the provider does not hold the LOtC Quality Badge the provider statement is completed.

ESCC approved centres list [click here](#)

Refer to OEAP National Guidance '**4.4h Preliminary Visits and Provider Assurances**'

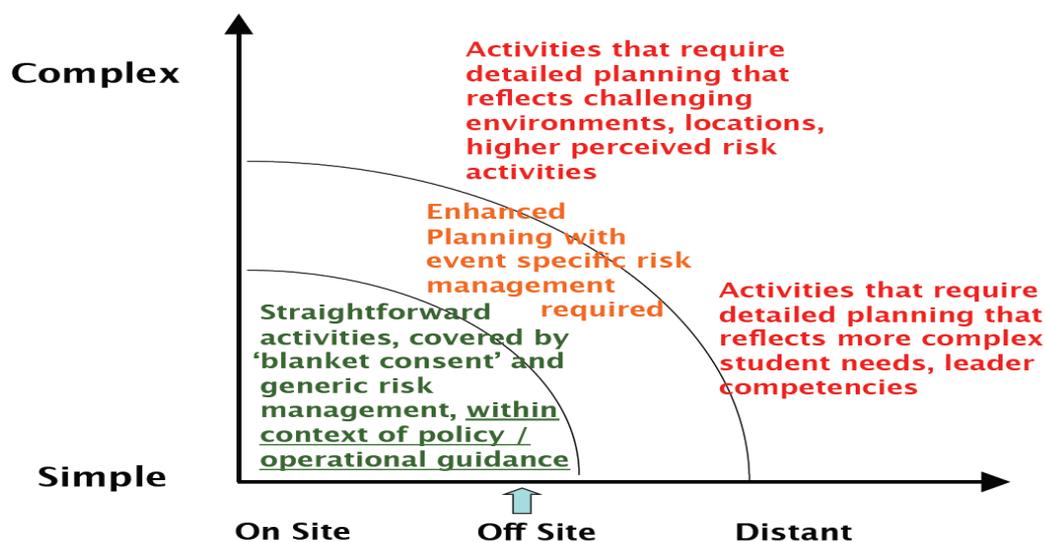
9.2 Planning the Visit

Planning an offsite activity or educational visit should reflect the consideration of legal and good practice requirements set out by the OEAP within the National Guidance and this Policy document. ESCC recommends the planning process is highlighted in the establishment's policy.

- Sets clear learning outcomes or aims for visits. This helps identify what the visit programme may look like and will help review and evaluate the visit.
- All staff (including adult volunteer helpers) and the young people should be involved in and have knowledge of the risk management process, including their roles and responsibilities.
- Those in a position of parental authority have been fully informed of the visit programme, and where appropriate formal consent obtained.
- Proportionate assurances have been obtained from any provider via the LOtC quality badge, the ESCC approved provider list or a satisfactory completed OEAP Provider Statement form.
- Designated 24/7 emergency contact identified for the duration of the visit. All details of the visit are accessible to the emergency contact.

Refer to OEAP National Guidance '**5.2b Planning basics**'

OEAP provides a number of check lists that should be referred to, in order to help plan for an offsite activity or educational visit, these can be found under '**checklists**'. The radar below will help identify the level of planning required for activities and can be accessed via OEAP National Guidance '**1d The Radar**'



9.3 Consent

Consent forms have been used in the past to get updated information about medical issues, food allergies etc. It is essential that this information is made available and each establishment should have some means of providing this relevant information to the Visit Leader. A prompt to remind parents to provide any updates could be included in the visit letter.

ESCC recommends consent is obtained using an annual consent form for Offsite Activities and Educational Visits that are local and non hazardous, which are routinely organised or part of the programme, for which information has been given.

It remains good practice to inform those in a position of parental responsibility that an activity or visit is taking place, and remind them they have given consent (if they have) and give them an opportunity to withdraw it and prompt them to update medical and contact information if this has changed.

Where an activity and visit falls within the hazardous, residential and overseas category, ESCC recommends seeking consent on each occasion, whilst providing full details of the visit and activities, so those in a position of parental responsibility can make informed consent. Information on charging and cancellation terms must also be communicated.

Refer to OEAP '**4.3d parental consent**'

9.4 Retention Schedule

A child can make a claim for an incident three years after they have reached the age of maturity, meaning until they are 21 years old. In the case of those with special educational needs, the age limit is 25 years. ESCC therefore requires visit details and consent to be retained until the youngest child on the visit reaches 25 years old. Exeant will store visit information electronically. Parental consent will also need to be kept for this period and can also be held electronically.

9.5 Evaluation and Value of Offsite Activities and Educational Visits.

Ofsted have recognised and reported on the value of learning outside the classroom. However, they have noted that visits are rarely evaluated with sufficient rigor.

Evaluating offsite activities and educational visits is paramount to ensuring learning outcomes and visit aims were achieved and to inform the Visit Leader of future adjustments that maybe required.

Refer to OEAP National Guidance '**Rigorous Evaluation of LOfC: Meeting Ofsted Expectations and Assuring Quality**'

10. Critical Incident Support and Emergency Planning

A critical incident is defined as:

1. Any member of the group on an offsite activity or educational visit is involved in an incident where they have suffered a life threatening injury or fatality, is at serious risk or has gone missing for a significant and unacceptable time.
2. An incident becomes critical when it goes beyond the normal coping mechanisms of the leaders.

ESCC has an Offsite Response Team to provide support to a group in crisis. This is for all maintained schools and youth services. If you are an academy, free school or independent school you will need to purchase this service. To contact the department, the following telephone numbers should be used.

Normal office hours 01273 481316 / 01273 336528

Outside office hours 01273 819179

These numbers should be carried with the visit leaders at all times during an offsite activity or educational visit, but are only to be used in a genuine emergency. Do not give these numbers to young people or their parents or guardians. Within your establishments policy a clear Emergency Procedure needs to be set out for the event an incident occurs offsite, noting when and who should contact Children's Services. If your establishment is the employer then follow OEAP National Guidance recommendation for writing an establishment policy.

Refer to OEAP National Guidance '**4.1c Emergency Procedure Good Practice for a Visit and Activity Leader**', '**Emergency planning: The Establishments Role**' and '**4.1a Employers Critical Incident Management**'

ESCC does provide critical incident training.

10.1 Emergency Contact

For every visit an emergency contact needs to be highlighted. This person should be contactable 24/7 for the duration of the visit; they should have all the information of the visit, including contact numbers, medical information, itinerary and have full understanding of ESCC critical incident support system and the establishments emergency procedure. They should be someone who can work well under pressure and in stressful situations.

10.2 Reporting accidents

ESCC Health and Safety team has an online accident reporting system, which can be accessed via Czone - It is advised that a printed template is taken with the visit leader on any visit, so details can be written down whilst they are at the forefront of their minds.

- Accident and incident reporting guidance [click here](#)
- Online accident reporting form [click here](#)
- Paper template of incident form [click here](#)

11 Transport

Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it, therefore careful planning is required.

ESCC sets out clear requirements on using Mini Buses and Private cars these can be found on Czone along with template letters for using private cars.

If buses or coaches are hired they should be through a reputable company.

When using public transport, inform the company of the size and date of when they will be using the transport, be respectful to members of the public and be aware of strikes, delays and cancellations,

ESCC Mini Bus Guidance
[ESCC Private Car use](#)

Refer to OEAP National Guidance '**Transport: General Consideration**'

12 Duke Of Edinburgh's Award

Information relating to the ESCC Requirements for DofE can be found on Czone.

[ESCC DoE Guidance.](#)

Refer to OEAP National Guidance '**DofE**'

DofE contacts for further information;

Phill Soulsby phillip.soulsby@eastsussex.gov.uk **01323 464977 or 07500 123556**

Catherine Corfield catherine.corfield@eastsussex.gov.uk **01323 464977 or 07919 227623**

13 Useful contacts

Offsite Education Advisor Leanne.bentley@eastsussex.gov.uk 01273 482522

Claims Administrator garry.saunders@eastsussex.gov.uk 01273 481578

Kim Hicks (Health and Safety) kim.hicks@eastsussex.gov.uk 01273 481938

Crisis Management julian.patmore@eastsussex.gov.uk 01273 482849

National Guidance www.oeapng.org.

Learning outside the classroom www.lotcqualitybadge.org.uk

Czone offsite visits homepage
<https://Czone.eastsussex.gov.uk/teachinglearning/curriculum/offsiteactivities/Pages/main.aspx>