



National
Guidance

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Establishment Self-Evaluation Form – Outdoor Learning and Off-Site Visits

This form is intended to help an establishment to evaluate and monitor its management of outdoor learning and off-site visits. It is suggested that the Educational Visits Coordinator (EVC) and Head/Manager of the establishment should complete this form together, and that the Governors/Directors/Trustees are involved as appropriate.

Information about good practice can be found elsewhere in OEAP National Guidance (the numbers in brackets refer to some relevant documents).

Score each requirement on a scale of 1 to 3, and add comments as appropriate.

1. Unsatisfactory – immediate action required
2. Requires improvement
3. Satisfactory.

At the foot of the main form are two additional forms, to record any required actions or training identified during the evaluation.

Establishment _____

Head/Manager _____

EVC _____ Date completed _____

Requirement	Score	Comments
Outdoor learning and educational visits are an integral part of the work of the establishment and there is clarity about their purpose and contribution to the ethos of the establishment (4.3a)		
The establishment has an Educational Visits Coordinator who is an experienced visit leader (3.4i)		
Roles relevant to visits/outdoor learning are clear (3.1b)		
There is access to advice such as from a competent outdoor education adviser (3.1a)		
There is a policy for visits/outdoor learning, which follows any relevant employer policies, and adopts OEAP National Guidance (5.3b)		

Requirement	Score	Comments
Any training required by the policy has been undertaken		
There are standard operating procedures for straightforward and routine visits/activities (1b)		
Staff induction and training needs are identified and addressed		
Procedures are followed correctly, and visits are formally notified and approved as required by the policy		
Procedure and responsibility for engaging leaders and determining their competence is clear (3.2d)		
All adults including volunteers are vetted, and those engaging in regulated activity have enhanced Disclosure and Barring Service (DBS) checks with barred list check (3.2g)		
Inexperienced visit leaders receive training/mentoring alongside experienced colleagues		
Information about the range of visits/outdoor learning and their contribution to establishment effectiveness is regularly considered by senior leadership/management and by governors/trustees		
External providers are appropriately selected and used (4.4g , 4.4h)		
Systems are in place for informing parents, and for obtaining their consent when required (4.3d)		
Systems are in place for obtaining and securely handling up-to-date participant data including contact details, medical information, dietary requirements and information about special needs (4.4j)		
Medical, dietary, first aid, inclusion and accessibility issues are all addressed (3.2e , 4.4b , 4.4d , 4.4i)		
The planning and management of visits takes into account current government guidance about epidemics (such as coronavirus 4.4k)		
Safeguarding issues are addressed (3.2g , 4.3e)		
Any travel, transport, and residential arrangements are appropriate (4.2b , 4.5a)		
Plans for visits/outdoor learning include alternative options (a 'Plan B') for potential changes of circumstances (4.1a)		
There is an establishment emergency plan, which is periodically tested (4.1d , 4.1h)		
There are arrangements for emergency contact including for activity beyond normal establishment hours and 24/7 for residentials, with access to all relevant information and documentation (4.1d)		
Accidents and incidents are reported and investigated, learning is shared and RIDDOR requirements are met		

Requirement	Score	Comments
Visit Leaders have access to sufficient funds and an effective means of communication in case of emergency		
The establishment has suitable insurance in place to cover the normal range of visits and activities, and specific additional insurance is arranged when necessary (4.4c)		
Any charges to participants/parents comply with the establishment's charging policy (3.2c)		
Contracts with providers and participants/parents are satisfactory (3.2i)		
The establishment holds an Adventure Activities Licence if it provides adventure activities for participants from another establishment (3.2f)		
The requirements of the Package Travel Regulations are met for any visits organised by the establishment that are in their scope (3.2h)		
Monitoring is in place to ensure that all requirements of the employer and establishment are met, and that the quality of visits/outdoor learning meets expectations (3.2b)		
Visits/outdoor learning are reviewed and evaluated, and good practice is shared (4.2c, 5.1d)		

If the evaluation has identified the need for specific actions, note them here.

Action required	Person responsible	Target date

If the evaluation has identified any training needs, note them here.

Training need identified	People in need of training	Target date

