



National
Guidance

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Writing an Establishment Policy for Outdoor Learning, Off-Site Visits and Learning Outside the Classroom

Every establishment should have a policy setting out its expectations of how outdoor learning, off site visits and learning outside the classroom will be managed. This document provides advice about what such a policy should contain.

The policy detail will depend upon the type of establishment, the nature of the activities and visits it provides, and (if the establishment is not itself the employer) any relevant policies or guidance provided by the employer.

We recommend that the policy adopts OEAP National Guidance (unless this has already been done by your employer). This will ensure that it reflects nationally recognised standards that are kept up to date, and will reduce significantly the amount of guidance material that you need to write. The policy should be written in consultation with all relevant staff and the management body, so that there is acknowledged and shared ownership.

Consider how staff will access the policy and any related documents – whether in hard copy or electronically – and how revisions will be made and communicated.

The following key areas should be considered.

1. Introduction

The introduction should explain:

- The scope of the policy – who it applies to, and what activities it applies to;
- Why your establishment provides outdoor learning, offsite visits and Learning Outside the Classroom, and the part they play in the life of the establishment. This could include reference to your underpinning philosophy and to the anticipated benefits and outcomes.

2. Employer's policies and National Guidance

You should make a link or reference to any relevant policies provided by your employer.

If you have adopted National Guidance, you should state this and link to it, and explain that employees must follow that guidance as well as the requirements of your own establishment policy. The policy should clearly state that in the event of any apparent conflict between your employer's policy, your establishment policy or National Guidance, then your employer's policy must be followed and clarification sought from the Educational Visits Coordinator (EVC) or management.

3. Clarification of Roles

National Guidance outlines the normal responsibilities of various roles including:

- Governors/management board
- Head/manager
- Educational Visits Co-ordinator (EVC)
- Visit leader.

Your establishment policy should clarify any establishment-specific requirements of these and other roles. Any delegation of key areas of responsibility, such as assessment of competence or approval must be clear.

The policy should also set out the criteria for selecting the EVC, if these are different from those recommended in National Guidance.

4. Procedural requirements

The establishment policy should explain any specific procedural requirements, including those relating to:

- Risk assessment (see below);
- Approval of staff to lead activities and visits (see document 3.2d "Approval of Leaders");
- Evaluation of external providers (see below);
- Parental communication and consent (see document 4.3d "Parental Consent");
- Participant information and data protection (see below);
- Prior notification and approval of visit plans;
- Any types of visit that should be approved only after consultation with an external adviser;
- 'Checking out' and 'checking in' before, during and after a visit;
- Emergencies (see below);
- Monitoring (see below);
- Evaluation (see documents 5.1a, 5.1b and 5.1c).

See also document 5.3a "Writing policies to reduce bureaucracy for routine off-site activities and visits".

5. Monitoring

See document 3.2b "Monitoring".

The establishment policy should clarify:

- The role of the EVC, Head and governors/management board in approval and monitoring;
- The extent to which the EVC and/or senior staff should monitor visits by field observation;
- Any arrangements for peer monitoring.

6. Induction, training, apprenticeship, succession planning

The establishment policy should set clear expectations for staff induction and training. This will usually require that staff identified as requiring practical training and experience as assistant leaders are given the opportunity to work within an apprenticeship model.

The policy should clarify:

- Induction requirements;
- Training requirements (e.g. EVC and visit leader training);
- Requirements for record keeping;
- How the establishment addresses issues of succession planning to ensure the sustainability of visits.

7. Risk management and risk-benefit assessment

National Guidance provides advice about risk management and risk-benefit assessment.

The establishment policy should set out the establishment's expectations for risk management recording. These requirements should be proportionate to the risks and should not impose unnecessary bureaucracy.

The policy should address:

- Any required procedure for carrying out, recording, approving and reviewing risk assessment records;
- Staff training in risk management and risk-benefit assessment;
- The involvement of all staff, and young people where appropriate, in the planning and preparation of visits, including risk management and recording of the risk-benefit assessments;
- The provision of generic risk assessments and standard operating guidelines where appropriate, to avoid the need for writing event-specific risk assessments for every visit. You can find further guidance on this in documents 1b "Foundations" and 4.3c "Risk Management – an overview".

It should also set out any requirements or guidance specific to the establishment, for example:

- Information about specific local hazards and how the associated risks should be controlled (e.g. specified safe road crossing places);
- Any minimum requirements for staff ratios, depending on the nature of the young people with which the establishment works, for specific types of visit;
- Transport arrangements.

8. Assessing venues and providers

The establishment policy should clarify expectations about the selection of venues, facilities and external providers.

To reduce bureaucracy for both leaders and providers, you should take advantage of established national approval schemes. You can find further guidance in documents 4.4h "Using External Providers and Facilities" and 4.4f "Assessing an Adventure Activity Provider".

For providers who do not hold external accreditation, please see document 8p, which is a pre-visit questionnaire to assist with gaining information to make an approval decision.

You should **not** normally ask for copies of providers' risk assessments, but should seek any information specifically aimed at helping visit leaders to manage their visit.

The policy should clarify what circumstances would require a preliminary visit by staff to check a venue or provider.

9. Volunteers

If your establishment uses volunteers, the establishment policy should address the following (unless this is covered by your employer's guidance):

- The vetting procedures for volunteers, including when an enhanced DBS check is required;
- The minimum induction and training procedures for volunteers;
- Under what circumstances, if any, volunteers may act as Visit Leaders or their assistants (if volunteers are allowed to act as Visit Leaders, they must be accountable, which implies that they have been engaged through a thorough recruitment process that includes vetting and induction into the establishment's policies and procedures);
- How volunteers are assessed as competent to carry out their assigned role;
- Requirements for supervision of volunteers.

10. Emergency Procedures and Incident Reporting

See documents 4.1i "Emergencies and Critical Incidents – an Overview" and 4.1b "Off-Site Visit Emergencies: the Establishment's Role".

The establishment policy should explain the visit emergency procedures, including any procedures or support provided by the employer. This should include nominating suitable people to provide 24/7 cover at base during a visit. The emergency contact(s) should have 24/7 access to all details of the visit, including medical and next-of-kin information for staff and young people.

It should also refer to the establishment's or employer's procedures for incident reporting.

11. Behaviour

The establishment policy should encourage the use of codes of behavioural conduct as a means of establishing appropriate expectations of young persons' behaviour. Such codes should be explained to young people and parents before a visit, so reducing the opportunity for misunderstanding both expectations and the sanctions that may be invoked where the code is breached.

The policy should address the following:

- Do young people sign up to a "behavioural contract" for all residential visits?
- Do parents also sign and accept responsibility for removing young people in prescribed circumstances?
- What are the expectations for discipline and sanctions on visits?
- Any specific establishment rules relevant to visits (e.g. whether children are allowed to bring mobile phones or other electronic devices)?

12. Inclusion

Your establishment policy should incorporate these principles:

- A presumption of entitlement to participate;
- Accessibility through direct or realistic adaptation or modification;
- Integration through participation with peers.

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**.

Expectations of staff must be reasonable, so that what is required of them (to include a given young person) is within their competence and is reasonable. You can find further guidance in document 3.2e "Inclusion".

13. Insurance

The establishment policy should summarise the relevant insurance arrangements you have in place, and any requirements for arranging insurance for specific types of visits.

14. Finance

The establishment policy should explain the expectations and requirements for dealing with finance for visits, including:

- The establishment's charging policy. See document 3.2c "Charging for School Activities";
- Any arrangements in place for young people unable to afford a visit;
- Requirements for accounting, banking and reporting.

15. Data Protection

Information about staff and participants, including recognisable photographs, is subject to data protection law. See document 4.4j "Participant Information and Data Protection".

It is vital for the health and safety of those involved in visits that relevant information is available to leaders and external providers for planning activities, and in the event of an emergency. Your establishment policies should allow appropriate sharing of personal data for visits, and set out procedures for handling it.

