



National  
Guidance

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## Foundations

This document explains the thinking and principles upon which National Guidance is based.

### Starting points

National Guidance starts from three basic premises:

1. Well planned and facilitated opportunities to learn in the real world, away from the classroom, and to experience adventure, help to improve the lives of young people.
2. Delivering learning outside or off-site does not need to be more difficult than delivering it inside a classroom. Planning and management should, therefore, be practical, proportionate and non-bureaucratic.
3. The key to effective and successful outdoor learning and off-site visits is:

**The right leaders doing the right activities with the right young people in the right places at the right times**

### The SAGE Variables

This means that the following 'SAGE variables' must be considered in the planning, management and delivery of visits:

#### Staff

#### Activities

#### Group

#### Environment(s)

##### 1. Staff

While all activities and visits must have a single, designated, competent leader, getting the competence and composition of the leadership team right is the single most important factor in the effective management of outdoor learning and off-site visits.

Competence is a combination of skills, knowledge, awareness, judgement, training and experience. It is not related to age or position within the establishment.

Competence:

- is situational – a leader who is competent in one activity or environment may not be so in another;
- involves breadth as well as depth - relevant experience is not necessarily gained by repeating the same thing several times, but by experiencing a range of different activities and environments.

The other SAGE variables, either alone or in combination, create the circumstances that the leadership team will have to manage.

Managing a visit involves:

- Matching the activities and environments to the aims of the visit, and to the needs and abilities of the young people.
- Ensuring that the competence of the leadership team is appropriate.

## 2. Activities

Activities vary in range and suitability. Both the planned learning activities and any supplementary activities, such as those associated with travelling, 'free time' and accommodation, etc., must be considered. Some activities may require specific training or qualifications; some may need specialist equipment; and some may require a particular level of competence or prior training of the participants.

## 3. Group

The age, competence, maturity and behaviour of the participants must be matched to the other variables, and any individual, medical or special needs addressed. If a group comprises more capable participants, and there is appropriate leader competence, it should be possible for the group to experience a more challenging range of activities and/or environments.

## 4. Environment(s)

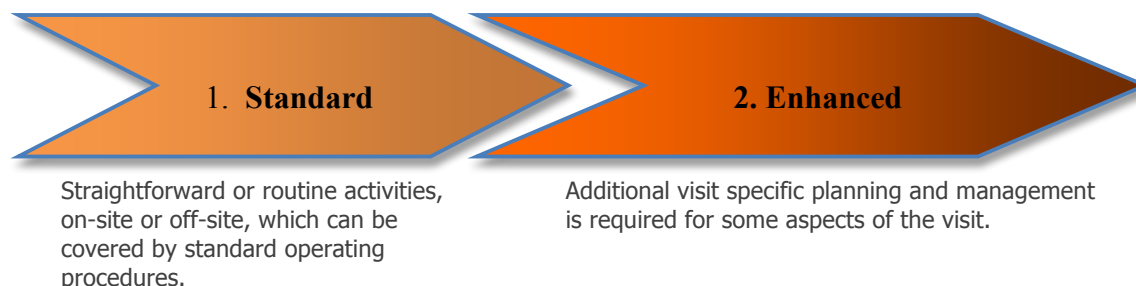
All environments and venues present their own challenges for the management of a group of young people. Considerations include whether the environment is indoors or out; a public space or restricted access; urban, rural or remote; quiet or crowded; within the establishment grounds, close to the establishment or at a distance and the ease of communications between the group and base. The time of day/night, season of the year and weather conditions can also affect the complexity of the environment, and hence the considerations.

## A range of planning and management requirements

The SAGE variables do not operate in isolation and the interplay between them should be planned for and managed. As an example, consider an annual visit which has run successfully for the past few years, but this year one variable changes (such as an experienced leader has left, or the weather is far worse than previously, or the participants are more 'difficult' than before): suddenly it is no

longer the right people in the right place, doing the right things - and that's when things can go wrong.

The interplay of the variables leads to a range of planning and management requirements that can be divided into two categories:



Note that the boundary between Standard and Enhanced varies between and within establishments.

Example - a visit to a castle:

- Could fall within 1 'Standard' if, for example, your establishment is close to the castle, your leaders and young people are used to the environment, and any particular hazards are addressed through standard operating procedures.
- Could fall just within 2 'Enhanced' if, for example, you are taking very young children, young people with mobility disabilities or those with behaviour issues; if transport is complicated; or if it were a new venue to your establishment and your leaders.
- Could fall towards the far end of 2 'Enhanced' and require detailed and elaborate planning if, for example, you are taking part in, or staging, a historical re-enactment.

This example underlines a proportional approach to planning. 'Standard' activities should be straightforward to arrange, enabling and encouraging leaders to respond readily to offsite and outdoor learning opportunities. Your Employer's and Establishment's arrangements should support this.

### 'Standard' planning and management.

This is appropriate for activities that take place on-site (but out of the classroom) or visits within an area covered by standard operating procedures. Some establishments refer to this as 'zone 1' or a 'learning area', within which activities happen as a normal part of the establishment day.

The geographical boundaries that you set for standard activities should take account of the opportunities, facilities and resources as well as the hazards and problems within the community. Consideration should also be given to the establishment's capacity to respond to an incident.

Anywhere within safe walking distance is simple, but the area may be extended to include frequently used venues or locations requiring transport. You can find further guidance in document 5.3a *'Writing policies to reduce bureaucracy'*.

Having generic policy and standard operating procedures in place will avoid having to reinvent plans on each occasion, which would be an unnecessary burden for Visit Leaders.

Whatever way an establishment chooses to determine 'standard' visits and activities, the following must be covered within the generic policy or procedures:

- Clearly defined geographical boundaries.
- Clearly defined activities.
- Defined leader competencies/identification of approved leaders.
- Induction and training.
- Generic risk management procedures.
- Parental information and blanket consent (where consent is needed).
- Transport – (e.g. the establishment minibus, local public transport).
- First aid.
- Communications.
- Emergency plan.

Standard procedures are also needed to ensure that on the day:

- There is a sufficiently competent leader/leadership team.
- There is an emergency base contact at the establishment.
- The appropriate people know who has gone where, with whom, and when they will be back.
- Approval, if needed, has been given.
- The Visit Leaders have appropriate information about the individual needs of participants.
- Effective communication between the establishment and the leaders is possible.

### 'Enhanced' planning and management

This is required when one or more aspects of the visit or activity are not covered by standard operating procedures. Enhanced planning and management may be as simple as adding another adult helper to the leadership team or ensuring that a particular young person has their medication. On the other hand it may involve an intensive 12 to 24 month build up: for example, for an adventurous overseas expedition.

