



National
Guidance
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Foundations

This document explains the National Guidance starting points for the planning and management of outdoor learning, off-site visits and learning outside the classroom.

For the status and remit of National Guidance, and a discussion of the rationale underlying it, see document [1c "Status, Remit and Rationale"](#). For definitions of key terms used in National Guidance, see document [1a "Glossary and Definitions"](#).

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. Facilitating learning outside or off-site does not need to be more difficult than 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.

National Guidance seeks to describe good practice which builds on these basic premises.

Good Practice

Good practice means having:

- Employer and establishment policies that are enabling;
- Clear aims;
- Competent and effective leadership;
- Thorough planning taking into account the 'SAGE' variables (see below), with a 'Plan B' when necessary;
- Proportionate risk management;
- Effective supervision;
- Sound selection and use of external providers;
- Preparation for emergencies;
- Monitoring;
- Review and evaluation.

See document [4.3a "Good Practice – the Basics"](#) for more details.

The 'SAGE' Variables

The following variables should be considered in the planning, management and leadership of visits:

Staff

Activities

Group

Environment(s)

Staff

While all activities and visits should have a single, designated, competent Activity Leader or Visit Leader, getting the competence and composition of the whole visit leadership team right is the single most important factor in the effective management of outdoor learning and off-site visits.

Leaders must be **accountable**, **confident** and **competent** to lead the specific visits or activities for which they are approved.

Being accountable involves the leader being engaged through an appropriate recruitment process.

Being confident requires leaders to have the ability to take charge of a situation while being aware of, and understanding, their abilities and limitations.

Being competent means that the leader has demonstrated the ability to operate effectively and safely. Competence:

- Is a combination of skills, knowledge, awareness, judgement, training and experience - it is not necessarily related to age or position within the establishment;
- Is situational - a leader who is competent in one activity or environment or with one type of group may not be so in a different situation;
- 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.

Activities

Activities should be selected to meet the needs and aspirations of the group and to achieve the desired outcomes. All activities, including those associated with travelling, 'free time' and accommodation, should be planned and managed with the same care. Some activities may require specific training or qualifications; some may need specialist equipment; and some may require the participants to have a particular level of competence or prior training.

Group

The age, abilities, maturity and behaviour of the participants should be matched to the activities and environment, and any individual needs addressed, so that each individual experiences an appropriate level of challenge in order to maximise the benefits to them. It should be possible for more capable participants with a leader of appropriate competence, to experience a more challenging range of activities and/or environments.

Environment(s)

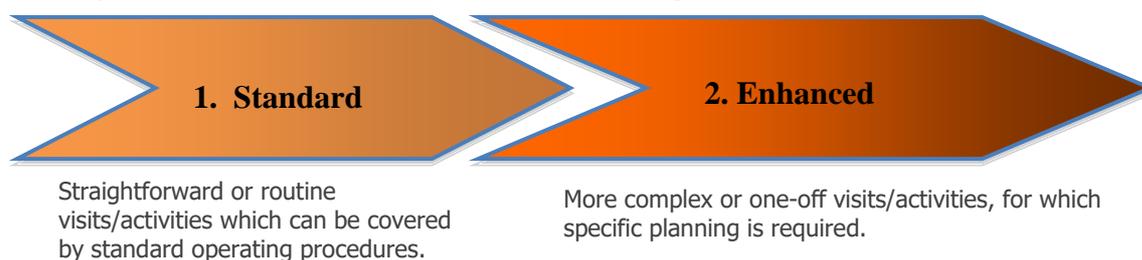
All environments and venues present their own challenges for the management of a group. Considerations include whether the environment is indoors or out, public or private, urban or rural, hazardous or benign, quiet or crowded, close to the establishment or at a distance from it; remote from or close to help in an emergency, and whether communications between the group and base are straightforward or difficult. The time of day/night, season of the year, weather conditions and risk of infection during an epidemic can also affect the complexity of the environment, and hence the considerations.

The Interplay of the SAGE Variables

The SAGE variables do not operate in isolation, and the interplay between them should be planned for and managed. For example, consider an annual visit that has run successfully for the past few years, but this year one or more of the variables changes (such as an experienced leader has left, or a familiar activity is unavailable so an unfamiliar one is substituted, or the participants are more 'difficult' than before, or the weather is far worse than previously – or all four!). Suddenly it is no longer the right people in the right place, doing the right things at the right time - and that's when things can go wrong.

Standard and Enhanced Planning and Management

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



Having standard operating procedures in place avoids having to reinvent plans on each occasion, which is an unnecessary burden on Visit Leaders.

The boundary between Standard and Enhanced varies between establishments, as what is straightforward or routine for one establishment may be complex or unusual for another. The boundary can also vary for one establishment as circumstances change.

For example - a visit to a castle could fall within:

- Category 1 (Standard) if your establishment is close to the castle, your leaders and young people are familiar with the environment, and any particular hazards are addressed in the standard operating procedures;
- Category 2 (Enhanced) if, for example:
 - It is a venue with which you are not familiar or do not visit regularly;
 - You are staging a historical re-enactment, even if the venue is familiar, because the activity is not standard.

This example underlines the need for a proportionate approach to planning. 'Standard' visits and activities should be straightforward to arrange, enabling and encouraging leaders to respond readily to learning opportunities. Your employer's and establishment's arrangements should support this.

Using standard operating procedures is appropriate for visits and activities that an establishment organises frequently, as part of its normal programme, such as outdoor activities or visits within a defined local geographical area. Some establishments refer to this as a 'local learning area', within which activities happen as a normal part of the day. The area could be defined to include frequently-used locations further from the establishment, perhaps including some that require transport.

In defining the geographical area and the type of activities to be included within category 1 (Standard), the establishment should take account of the opportunities, facilities and resources available, any significant hazards identified by risk assessments of the planned activities, any community issues, staff competence, the nature of the participants and the establishment's capacity to respond to an incident.

Whatever way an establishment chooses to determine Standard visits and activities, the following should be covered within the standard procedures:

- Clearly defined geographical boundaries;
- Clearly defined activities;
- Required leader competencies and identification of approved leaders;
- Induction and training requirements;
- Procedures to manage any significant risks identified;
- Parental information and blanket consent (if consent is needed);
- Transport if necessary;
- First aid;
- Communications;
- Emergency procedures for Visit Leaders, linked to the establishment's emergency plan.

Standard procedures should ensure that on the day:

- There is a sufficiently competent leader/leadership team to deal with both the expected and the unexpected;
- There is an emergency contact at the establishment;
- The appropriate people know who has gone where, with whom, and when they will be back;
- Approval, if required, has been given;

- Visit Leaders have appropriate information about the individual needs of participants so that they can make specific arrangements for that group;
- Effective communication between the establishment and the leaders is possible.

On the day, if there is anything non-standard about the group or the circumstances, it is important that plans and procedures are reviewed and adjusted as necessary.

Standard procedures should be reviewed regularly to ensure that they remain robust.

More complex visits or activities, which are not covered by standard operating procedures, should be regarded as being in category 2 (Enhanced), and require specific planning and risk management.

Some employers define additional categories and require establishments to notify the employer or seek approval for certain types of planned visit.

