



Management of Learning outside the  
Classroom

2015

# Management of Learning outside the Classroom Policy Document

## Policy for the Management of Learning Outside the Classroom

### 1. Provision of Employer Guidance

Newcastle City Council has formally adopted “*LOtC Employer Guidance*” as “Newcastle City Council Guidance”. This LOtC guidance can be found on the following web site:

<http://oeapng.info/>

It is a legal expectation that employees **must** work within the requirements their employer’s guidance; therefore Newcastle City Council Department of Education employees must follow the requirements of “LOtC Employer Guidance”, as well as the requirements of this Policy Statement.

Newcastle City Council employees should also follow LOtC EG recommendations. Where another employer (such as the Governing Body of a Voluntary Aided school) wishes to opt into Newcastle City Council guidance, systems and processes for supporting and monitoring LOtC activities, they should produce a policy statement that makes this clear. Where a Newcastle City Council employee commissions LOtC activity, they must ensure that such commissioned agent has either:

1. adopted Newcastle City Council or LOtC Employer Guidance
- or**
2. have systems and procedures in place where the standards are not less than those required by LOtC Employer Guidance.

### 2. Scope and Remit

The LOtC EG document “***Basic Essentials MUST Read - Status and Remit***” clarifies the range of employees whose work requires them to use the guidance. In summary, it applies to employees whose work involves any one of the following:

- direct supervision of young people undertaking experiences beyond the boundary of their normal operational base;
- direct supervision of young people undertaking experiences that fall within the remit of Learning Outside the Classroom;
- facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base;
- deploying staff who will supervise or facilitate experiences of or for young people undertaking experiences beyond the boundary of their normal operational base;

This applies regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the LOtC EG document: “***Underpinning Legal Framework***”

### **3. Ensuring Understanding of Basic Requirements**

As an employer, Newcastle City Council is required to ensure that its employees are provided with

- appropriate guidance relating to visits and LOtC activity;
- employer-led training courses to support the guidance to ensure that it is understood;
- suitable systems and processes to ensure that those trained are kept updated;
- access to advice, support and further training from appointed Advisers that have proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

The appropriate guidance for the management of outdoor learning and LOtC in Newcastle City Council is the LOtC Employer Guidance web site.

#### **The relevant training courses in Newcastle City Council are:**

1. Newcastle City Council Visit Coordinator (EVC) Training - all Newcastle City Council Children's Services establishments are required to have a current, Newcastle City Council - trained EVC in post.
2. Newcastle City Council Educational Visit Coordinator (EVC) Revalidation - all Newcastle City Council Children's Services establishments are required to ensure that their EVC undertakes a formal revalidation from time to time.
3. Newcastle City Council Visit Leader Training – this course is strongly recommended for all those who lead LOtC activities and is a requirement of Newcastle City Council leaders from April 2013. Currently there is no revalidation requirement. However, to meet LOtC guidance requirements regarding leader competence, leaders must be current in their knowledge of expectations of good practice, so update refresher training is strongly recommended. For the purposes of day-to-day updating of information, Newcastle City Council EVCs and Visit / Activity Leaders are directed to the posting of “*EVC Information Updates*” (which include information on how to access the relevant courses) available on the following web link: <https://community.newcastle.gov.uk/schextranet>

Where an employee experiences problems with finding the material they are looking for, or require clarification or further help and guidance, they should contact their establishment's Educational Visits Coordinator (EVC), or the adviser nominated by their employer.

The nominated adviser in Newcastle City Council is:

Marcus Tinsley

Phone: 0191 2741684 work

Mobile 07795323848

E-mail [marcus.tinsley@broadwood.newcastle.sch.uk](mailto:marcus.tinsley@broadwood.newcastle.sch.uk)

Email: [educational.visits@newcastle.gov.uk](mailto:educational.visits@newcastle.gov.uk)

#### **Educational Visits Coordinator (EVC)**

All schools (and Council services) which provide External / Outdoor Education and Off-site Visits must have an Educational/External Visits Coordinator (EVC) in post. The role of the EVC is described in the OEAP National Guidance. EVCs must undertake an EVC training course and a refresher / revalidation course every three years, both of which are provided by the Outdoor Education and Off-site Visits Advisory Service. The course includes training on visit planning, risk assessment, leader competence and required procedures. Headteachers/Managers are also welcome to attend EVC training.

Services which provide very few External Visits may decide to group together with other services and to share one EVC between them.

### **Role of the Educational Visits Coordinator**

To help fulfil its health and safety obligations for visits, establishments should appoint an Educational Visits Coordinator (EVC) who will support the Head of Establishment. In small establishments the EVC may also be the Headteacher or manager. Should the establishment choose not to appoint an EVC, those functions will automatically fall to the Head of Establishment.

The EVC should be specifically competent, ideally with practical experience in leading and managing a range of visits similar to those typically run by the establishment. Commonly, but not exclusively, such competence will be identified in a person on the senior management of the establishment.

The EVC must attend initial EVC training. Subsequent half-day update training (non-compulsory) is available as a refresher, and is particularly recommended for those who are involved in the role infrequently.

The EVC should support the head of establishment in ensuring that competent staff are assigned to lead and accompany visits.

### **4. Approval and Notification of Activities and Visits**

Employer guidance **must** provide clarity on issues where responsibilities and functions are delegated. This is particularly critical in establishing requirements regarding formal notification and formal approval of activities. Newcastle City Council delegates the responsibility for formal approval of all Visits and LOtC activity to establishment Heads / Managers. It is a requirement of this policy that Heads and Managers carry out this function in accordance with LOtC Employer Guidance.

Although approval is delegated, establishments must notify the authority of visits and activities falling within any one of the triggers set out below:

- involves a residential or overnight stay; Category B
- involves the provision of an adventurous activity. Category C
- Foreign trips of any kind Category D

The above notification procedure requires the submission of the EV forms detailed on the extranet and in appendices. See 'Monitoring and Compliance for further detail, eg timescales etc. Details can be found on the links provided on the extranet.

Newcastle City Council uses an online system for notification and support via email of a dedicated EV form EV1 and 2 plus additional information incorporating risk assessments, itinerary, external provider information and parental communication. A key feature of this system is that visits and LOtC activities requiring LA support are automatically brought to the attention of the Local Authority. Those visits and activities not requiring LA support should be held in school.

It is a requirement that all Newcastle City Council establishments use the email notification system. In approving visits the Head of Establishment and EVC should ensure that the visit leader has been appropriately inducted /trained, and is competent to lead the visit.

**'Ad-hoc' activities:** Where there are local activities that are a planned part of the curriculum but are dependant upon the right conditions on the day, then the visit leader should sign out before departure leaving relevant information with the base contact. Such activities must be addressed in the school policy with a generic management plan in place. Following the activity, visit leaders are encouraged to record the event on the same day on the EV notification form for recording purposes.

**All other visits:** It is recommended that all other relevant visits are entered onto EV notification form , in order to aid planning and reduce bureaucracy.

The EVC should ensure that a school policy is in place for educational and off-site visits, and that this is updated as necessary.

## **5. Risk Management**

As an employer, Newcastle City Council has a legal duty to ensure that risks are managed – requiring them to be reduced to an “acceptable” or “tolerable” level - and not to eliminate risks, as would be a reasonable expectation when risk assessing a piece of machinery, work shop or manufacturing process.

This requires that proportional (suitable and sufficient) risk management systems are in place, requiring Newcastle City Council to provide such support, training and resources to its employees as is necessary to implement this policy. The risk management of an activity should be informed by the benefits to be gained from participating. Newcastle City Council strongly recommends a “Risk-Benefit Assessment” approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. This appreciation of the benefits to be gained through participating provides objectivity to a decision that any residual risk (i.e. the risk remaining after control measures have been put in place) is “acceptable”. HSE endorse this approach through their **“Principles of Sensible Risk Management”** and advocate that it is important that young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

There is no legal or Newcastle City Council requirement to produce a risk assessment in a particular format; but there is a legal requirement for the process to be recorded and for suitable and sufficient control measures to be identified for any significant risks i.e. those that may cause serious harm to an individual, or harm several people. However, Newcastle City Council EVC Training ensures that establishments are supplied with an electronic portfolio of exemplar generic risk-benefit assessments, as well as exemplar event-specific assessments. These risk management materials can also be accessed through the following web link visit Health and Safety Section.

It is strongly recommended that establishments adopt and adapt these materials to ease the burden of bureaucracy that might otherwise discourage leaders from making full use of LOtC learning opportunities. Refer to LOtC EG document: **“Risk Management”**

## **6. Emergency Planning and Critical Incident Support**

A critical incident is an incident where any member of a group undertaking an off-site activity has:

- either suffered a life threatening injury or fatality;
- is at serious risk;
- or has gone missing for a significant and unacceptable period.

As an employer, Newcastle City Council is committed to providing emergency planning procedures to support establishments in the event of a critical incident.

Refer to LOtC EG document: **“Critical Incident Management for Visits”**

To activate support from Newcastle City Council, the following telephone numbers should be used:

**Normal office hours:**

**Business Continuity and Resilience Team - Schools**

Key officers: Margaret Curry, Alan Buick and Ash Des-Forges

Phone: 0191 2774410 or 0191 2774414

Email: [margaret.curry@newcastle.gov.uk](mailto:margaret.curry@newcastle.gov.uk)

**Health and Safety**

Key Officer: Simon Hoban

Phone: 0191 2115222

Email: [simon.r.hoban@newcastle.gov.uk](mailto:simon.r.hoban@newcastle.gov.uk)

**Outside normal office hours**

**Business Continuity and Resilience Team – Schools**

Emergency Duty Phone (24 hours) 07736372567

These numbers should be carried by leaders **at all times** during an off-site activity but should only be used in the case of a genuine emergency. Under no circumstances should these numbers be given to young people or to their parents or guardians.

**7. Monitoring**

As an employer, Newcastle City Council ensures that there is sample monitoring of the visits and LOtC activities undertaken by its establishments, either by attaching such monitoring duties to its officers, or by delegating these tasks to establishments. Such monitoring should be in keeping with the recommendations of LOtC Employer Guidance. There is a clear expectation that the monitoring function is a delegated task, principally carried out through systems put in place by the establishment EVC. Refer to LOtC EG document: **“Monitoring”**

**8. Assessment of Leader Competence**

LOtC Employer Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of **Newcastle** City Council Policy that all Newcastle City Council leaders and their assistants have been formally assessed as competent to undertake such responsibilities as they have been assigned in line with the LOtC guidance. Refer to LOtC EG document: **“Assessment of Competence”**

**Competence to Lead**

The competence of the visit leader is the single most important contributory factor in the safety of participants. The EVC and/or Head of Establishment must therefore consider the following when assessing the competence of a member of staff to lead a visit:

What experience has the leader in leading or accompanying similar or other visits? ( Visit History).

Is the leader competent in planning and managing visits?

What are the leader’s reasons for undertaking the visit?

Is the leader an employee of the local authority?

Does the leader have the ability to manage the pastoral welfare of participants?

Does the leader exhibit sound decision making abilities?

What experience has the leader of the participants he/she intends to supervise?

What experience has the leader of the environment and geographical area chosen?

Does the leader possess appropriate qualifications?

If appropriate, what is the leader’s personal level of skill in the activity, and fitness level?

If leading adventurous activities, has the leader been ‘approved’ by the Establishment and LA?

Is the leader aware of all relevant guidelines and able to act on these?

## 9. Role-specific Requirements and Recommendations

LOtC Employer Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within Newcastle City Council management structures. These are:

1. Director of Wellbeing, Care and Learning
2. Lead Member(s) for Education
3. Line Manager of an Outdoor Education Adviser (or equivalent post)
4. Outdoor Education Adviser
5. Adviser (other than an OEA) including Health and Safety Officer

Refer to individual LOtC EG documents headed as above.

LOtC Employer Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within most Children's Services establishments.

These are:

1. Member of Board of Governors or Management Board
2. Headteacher
3. Manager of an establishment other than a school
4. EVC
5. Visit or Activity Leader
6. Assistant Visit leader
7. Volunteer Adult Helper
8. Those in a position of Parental Authority

Refer to individual LOtC EG documents headed as above.

## 10. Charges for Off-site Activities and Visits

Newcastle City Council Heads/Managers, Curriculum Planners, EVCs and Visit/Activity Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996.

Refer to LOtC EG document: ***Charges for Off-site Activities and Visits in an Educational Establishment***

## 11. Vetting and DBS Checks

Newcastle City Council employees who work *frequently* or *intensively* with, or have *regular access* to young people or vulnerable adults, must undergo an enhanced DBS check as part of their recruitment process.

For the purposes of this guidance:

- frequently* is defined as "once a week or more";
- intensively* is defined as 4 days or more in a month or overnight.

However, it must be clearly understood that a DBS check (or other vetting procedure) in itself, is no guarantee as to the suitability of an adult to work with any given group of young or vulnerable people. The placement of an adult within a situation of professional trust (where young people could be vulnerable to physical or mental exploitation or grooming) should always be on the understanding that an overview based on a common sense risk-benefit assessment process has been considered.

Refer to LOtC EG document: ***"Vetting and CRB Checks"***

## 12. Requirement to Ensure Effective Supervision

In general terms, the Law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is "effective".

Effective supervision should be determined by proper consideration of:

- age (including the developmental age) of the group;

- gender issues;
- ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics etc);
- nature and location of the activity (including the type of activity, duration, skill levels involved, as well as the time of year and prevailing conditions,
- staff competence.

However, as an exception to the above, Ofsted and DfE guidance prescribe ratios for Early Years.

Refer to LOtC EG document: **“Ratios and Effective Supervision”**

Refer to LOtC document: **“Group management and Supervision”**

### **Staffing and Supervision**

On all visits there must be an ‘effective level of supervision’ that has been approved by the EVC and Head of Establishment, and where applicable is in accordance with Governing Body policy.

Ratios for Early Years are specified and must be adhered to, see *Statutory Framework for the Early Years Foundation Stage*. For all other visits the visit leader, EVC and Head of establishment must make a professional judgement regarding the number and suitability of staffing on an individual visit basis, after consideration of the following factors:

- the type, level, and duration of activity;
- the nature and requirements of individuals within the group, including those with additional needs;
- the experience and competence of staff and other adults;
- the venue, time of year and prevailing/predicted conditions;
- the contingency, or ‘Plan B’ options.

A visit must not go ahead where either the visit leader, EVC, or Headteacher is not satisfied that an appropriate level of supervision exists.

Visit leaders, EVCs and Heads/Managers often find it helpful to have ‘a starting point for consideration’.

Where departure from the starting point results in fewer staff, the justification should be recorded in the visit forms.

Staff who are assigned to support the special needs of an individual, cannot be included in the overall staffing ratio. Their responsibility should not include the wider group.

Particular consideration should be given to the additional implications that may arise if staff are to be accompanied by family members (or partners) on visits. Staff and volunteers who work *frequently* or *intensively* with, or have regular access to young people or vulnerable adults, must undergo an enhanced DBS check as part of their recruitment process. For the purpose of this guidance:

- *‘frequently’* is defined as ‘once a week or more’.
- *‘intensively’* is defined as ‘four or more days in a month, or overnight’.

Refer to relevant section/s of National Guidance

### **Remote Supervision**

Young people must be supervised throughout all visits. Where they are unaccompanied by a member of staff or other responsible adult, eg. D of E expeditions, ‘down time’ in a shopping mall, etc., this is known as ‘remote’ supervision. ‘Remotely supervised’ activities can bring purposeful educational benefits, and the progression from dependence to independence is to be encouraged. Such activities develop essential lifelong skills, including managing risk, self-sufficiency, interaction with the public and social skills, decision making, etc. In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

The decision to allow remote supervision should be based on professional judgement taking into account such factors as:

- \_ prior knowledge of the individuals (including their maturity and levels of responsibility);
- \_ venue and conditions;
- \_ the activity taking place;
- \_ preparatory training;
- \_ the competence of the supervising staff;
- \_ the emergency systems in place.

When recording a remotely supervised visit, there must still be a named visit leader. This will be the member of staff that has made a professional judgement regarding the level of responsibility and maturity of the participants, and decided that it is reasonable for them to be undertaking the specific activity unaccompanied by an adult. Refer to National Guidance

### **13. Preliminary Visits and Provider Assurances**

All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people. It is a vital dimension of risk management. Wherever reasonably practicable, it is good practice to carry out a preliminary visit. Establishment policy should clarify the circumstances where a preliminary visit is a requirement. It is good practice for Visit Leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available, thus reducing bureaucracy.

Examples of such schemes include:

- The LOtC Quality Badge
- AALS licensing
- Adventuremark
- NGB centre approval schemes (applicable where the provision is a single, specialist activity).

Newcastle City Council takes the view that where a provider holds such one of the above accreditations, there should be no need to seek further assurances.

Refer to: LOtC EG document "***Preliminary Visits and provider Assurances***

### **Using an External Provider**

An 'External Provider' is defined as where there is an element of instruction, staffing, or guiding, for example:

- Activity Centre
- Ski Company
- Educational Tour Operator
- Overseas Expedition Provider
- Climbing Wall where instruction is provided by climbing wall staff
- Freelance instructor of adventurous activities
- Youth Hostel (where instruction is provided)
- Voluntary organisation (e.g. Scout Association), where instruction is provided

For the purposes of LA approval, an External Provider is NOT a:

- Youth Hostel (where accommodation only is used)
- Hotel, B&B, etc
- Campsite
- Museums, galleries, etc
- Tourist attractions
- Theme Parks
- Farms
- Coach, Train, or Airline company

- Swimming Pool
- Climbing Wall where instruction is provided by a member of your establishment's staff with approval from school and LA support
- 'Volunteer' instructor of adventurous activities

The decision about the use of an external provider is the responsibility of the visit leader, EVC, and Head of establishment. The LA does not 'approve' external providers or tour operators. Establishments will find it useful to liaise with other LA establishments that have used any particular provider or seek advice from the LA to signpost a number of potential providers. Establishments should consider the requirements under 'best value' when selecting an external provider. To confirm that all aspects of the operation of the provider are satisfactory, the establishment must ensure that either:

The Provider holds an LOtC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

**or**

A 'Provider Form' has been satisfactorily completed by the provider - EV10

Note: If a Provider holds an AALA licence (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required.

For Providers that hold an LOtC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

No further action is necessary, other than to check the suitability of the provider/venue in relation to the intended aims or learning outcomes for the particular group.

**For Providers that do not hold an LOtC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)**

#### **PROCEDURE**

- Download a Provider Form EV10 from the Extranet
- Complete the top section.
- Send Provider Form to the provider (email, fax, post).
- On its return check that it has been satisfactorily completed.
- Keep Provider Form EV10 on file together with all other relevant documentation.
- It is not necessary to attach the Provider Form to SPACE.

Important: If the Provider has made any alterations to the wording of the Provider Form or is unable to comply, then you must discuss this with the Provider, and if necessary seek advice from the LA prior to making a commitment with the Provider.

The Provider Form should be sent to the provider at the time of making a provisional booking and no deposits should be committed prior to its satisfactory completion and return.

The satisfactory completion of a Provider Form does not necessarily signify that the service on offer will be appropriate for the young people from your establishment. A pre-visit and recommendation from previous users will help you decide on its suitability.

In some instances, for example where an establishment intends to use an 'external', voluntary individual for services, then this person may be regarded as a temporary member of staff and the use of volunteer procedure may be appropriate.

The above procedure is not sufficient for Overseas Expeditions (ie. those which typically take place in remote areas of the world and/or in developing countries), for which separate arrangements are applicable and must be complied with.

#### **14. Insurance for Off-site Activities and Visits**

Employer's Liability Insurance is a statutory requirement and Newcastle City Council holds a policy that indemnifies it against all claims for compensation for bodily injury suffered by any person employed by it.

This cover should extend to those persons who are acting in a voluntary capacity as assistant supervisors. Newcastle City Council also holds Public Liability insurance, indemnifying it against all claims for compensation for bodily injury from persons not in its employ, as well as for the accidental loss of, or damage caused to, property. Employees (as agents of the employer) are indemnified against all such claims, as are voluntary helpers acting under the direction of the employer's staff. The indemnity covers activities such as off-site activities and visits organised by all establishments and settings for which the employer is responsible.

Some level of Personal Accident Insurance is provided for all Newcastle City Council employees in the course of their employment, providing predetermined benefits in the event of an accident. However, Visit/ Activity Leaders should be advised that they should consider taking out less limited personal accident cover privately, or obtain cover through a professional association.

Newcastle City Council Visit and Activity leaders should contact the local authority Insurance Section to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the insurer. They should also ensure they have obtained current information regarding any special policies that may be available to offer more comprehensive cover. In addition to the standard public liability cover which all establishments will have in place the Council is able to offer Travel Insurance, including Personal Accident, Cancellation, Loss of Money, Personal Property and Medical Expenses for all School Journeys. Access to the cover is by completion of the annual return to the insurance section.

For those establishments who make their own insurance arrangements, the Head or Governing Body need to satisfy themselves that the cover is appropriate for the destination and activities planned. Responsibility for checking the cover rests with the visit organiser. For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC (European Health Insurance Card). See [www.dh.gov.uk](http://www.dh.gov.uk)

Refer to OEAP document: Insurance

Refer to LOtC EG document: "Insurance"

## **15. Inclusion and Equalities**

Every effort should be made to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender or religion. If a visit needs to cater for young people with special needs, every *reasonable* effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

Establishments should take all *reasonably practicable* measures to include all young people. The principles of inclusion should be promoted and addressed for all visits and reflected in establishment policy, thus ensuring an aspiration towards:

- an entitlement to participate
- accessibility through direct or realistic adaptation or modification
- integration through participation with peers

Employers, Heads/Managers, Curriculum Planners, EVCs and Visit Leaders should be aware of the extent to which Inclusion is or is not a legal issue.

Under the Disability Discrimination Act 1995, 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.
- Refer to LOtC EG document: "***Inclusion as a Legal Issue***"

## 16. Adventure Activities and Licensing Regulations

Employers, Heads/Managers, EVCs and 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 Activities Licensing Regulations and the Adventure Activities Licensing Authority (AALA), initially responsible to the DfES. The scheme is now the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

The intention of the regulations is to provide a regulatory framework to protect children, parents, teachers and schools when using providers of defined adventurous activities in closely defined environments. 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 is to be found in the Health and Safety Executive publication: "**Guidance to the Licensing Authority on Adventure Activity Licensing Regulations 1996**".

Leaders should be aware that the AALS license is an assurance of safety. It does not accredit educational or activity quality.

Refer to LOtC EG document: "**Summary of Adventurous Activity Licensing Regulations**"  
**Definition of an 'adventurous activity'**

### **The following activities are regarded as 'adventurous' and require LA approval:**

All activities in 'open country' (see below)

Swimming (all forms, excluding publicly lifeguarded pools)

Camping

Canoeing / kayaking

Sailing / windsurfing / kite surfing

Rafting or improvised rafting

Use of powered safety/rescue craft

All other forms of boating (excluding commercial transport)

Water skiing

Snorkel and aqualung activities

Hill walking and Mountaineering

Rock climbing (including indoor climbing walls)

Abseiling

River/gorge walking or scrambling

Coasteering/coastal scrambling/sea level traversing

Underground exploration

Shooting / archery / paintballing

Snowsports (skiing, snowboarding, and related activities), including dry slope

Air activities (excluding commercial flights)

Horse riding

Motor sport – all forms

High level ropes courses

Off road cycling

'Extreme' sports

Other activities (eg. initiative exercises) involving skills inherent in any of the above

'Open country' is normally defined as land above 300m, or more than 1km from vehicular access.

However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate.

Please contact the local authority if you think this might apply. *For level of competence required to lead in open country see Section 24*

For the purposes of LA support, the following activities are not regarded as adventurous and therefore do not require support. However, these activities must be supervised by a member

of staff who has previous relevant experience and who in the opinion of the EVC and Head of Establishment is competent to supervise the activity:

Walking in parks or on non-remote country paths

Field studies - unless in the environments stated in 'open country'

Swimming in publicly lifeguarded pools

Theme parks

Tourist attractions

Pedal go-karts

Ice skating (rink)

Farm visits

Local traffic survey

Museum, library, etc.

Physical Education and sports fixtures (other than the above)

### **Adventurous Activities**

This section is applicable to all adventurous activities except the following, for which separate guidance applies:

Water-based activities

Open country activities

Snowsports

Overseas expeditions

Newcastle LA acknowledges the immense educational benefits that adventurous activities can potentially bring to young people, and fully supports and encourages adventurous activities that are correctly planned, managed, and conducted.

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

The responsibility for the safety of participants in an adventurous activity will rest with either:

a) **An external provider**

The provider must hold an *LOtC Quality Badge* or complete a *Provider Form EV10*

Note: If a Provider holds an *AAALA licence* (and/or any other accreditation) but not an *LOtC Quality Badge*, then a *Provider Form* is still required.

Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.

**or**

b) **A member of your establishment's staff**

This person must be specifically approved by the establishment and NGB qualified to lead the activity

**Water-margin** activities as defined :-

**Activities that take place near or in water – such as a walk along a riverbank or seashore, collecting samples from ponds and streams, or paddling or walking in gentle, shallow water\*. It does not apply to swimming and other activities that require water safety or rescue qualifications and equipment, or water-going craft.**

\* 'gentle' means hardly moving at all.

'shallow' typically means up to the knees of the participants.

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

At the outset the leader must decide whether the activity:

Falls **within** the definition in bold above - in which case the below guidance applies,

**or**

**Exceeds** the definition in bold above - in which case this is a water-based adventurous activity and requires support from the LA

All staff involved in water-margin activities should be conversant with the guidance contained within *Group Safety at Water Margins* This document must be made available to all

supervising adults in advance of the visit. As with all visits, where appropriate there should be an approved alternative 'Plan B' that could be used where conditions dictate, and for which parental consent has been obtained if necessary.

LA approval is not required for water-margin activities, but the leader must have previous relevant experience, and must have been assessed as competent to lead the activity by the EVC and/or Head of Establishment.

Refer to relevant section/s of National Guidance

Please contact the local authority if there is uncertainty over whether a particular activity requires LA approval.

### **Water-Based Activities**

For clarification between water-margin and water-based activities see above

The following are not regarded as adventurous activities for the purposes of LA support:

- \_ Swimming in publicly lifeguarded pools
- \_ Water-margin activities as defined above
- \_ Commercial craft, tourist boat trips, and similar activities for which young people would not normally wear personal buoyancy.

With the exception of the above, all other forms of water-based activities are regarded as adventurous activities, and as such require LA support

The responsibility for the safety of participants in an adventurous activity will rest with either:

a) **An external provider**

The provider must hold an *LOtC Quality Badge* or complete a *Provider Form*

Note: If a Provider holds an *ALA licence* (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required.

Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.

**or**

b) **A member of your establishment's staff**

This person must be specifically approved by the establishment and NGB qualified to lead the activity. In order to participate in water-based activities, participants should normally be water confident. Participants who lack water confidence may still be able to take part subject to consideration of all factors, including the activity itself and supervision arrangements. The level of water confidence of all participants must be known by the activity leader prior to the commencement of water-based activities. Leaders should have knowledge of the water conditions/hazards (and potential changes) that might be encountered, and prepare accordingly. Local advice must be sought where appropriate, eg coastguard, harbour master, other site users, etc.

Personal buoyancy conforming to the appropriate National Governing Body must be worn at all times by all participants in water based activities, except, at the discretion of the activity leader, where the activity:

- a) takes place in a swimming pool, **or**
- b) is 'swimming', **or**
- c) is an activity for which personal buoyancy would not normally be worn by young people.

### **Swimming**

All swimming activities and venues must be included within the visit plan, and lifeguarding arrangements checked in advance. This is particularly important in respect of visits abroad, where for example, a hotel pool may be available.

**Young people must be supervised by a competent adult at all times whilst undertaking swimming activities. The following criteria apply:**

### **Swimming pools (lifeguarded)**

LA Approval is not required

UK Swimming Pool safety is guided by various Health and Safety at Work Acts and Regulations. Pool operators have a duty to take all reasonable and practicable measures to ensure that teaching and coaching activities are conducted safely.

For publicly lifeguarded pools abroad, the establishment's staff must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water.

Unless suitably qualified, the establishment's staff should not have responsibility for lifeguarding.

However, they do retain a pastoral role for participants at all times either through direct or 'remote' supervision.

For swimming lessons, the LA establishment should ensure the swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to current guidelines.

### **Hotel (and other) swimming pools**

Establishments should check the lifeguarding position in advance.

LA Approval is not required for this activity if qualified lifeguarding is provided at the pool.

If lifeguarding arrangements are not provided at the pool then the visit leader will bear the full responsibility for ensuring swimming safety, and support for the school to approve and to lead the activity will be required via the EV form

The following awards/qualifications apply:

For free swimming activity

A valid RLSS UK National Pool Lifeguard Qualification (NPLQ), or equivalent in the country visited - see

[www.lifesavers.org.uk](http://www.lifesavers.org.uk)

For structured or programmed activity

A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC) or equivalent - see [www.lifesavers.org.uk](http://www.lifesavers.org.uk) **or**

A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement. (available from 2012) see [www.lifesavers.org.uk](http://www.lifesavers.org.uk)

The role of the lifeguard is:

To directly supervise the pool and the pool users, exercising appropriate levels of control.

(Note: the lifeguard should remain on the poolside at all times except in the case of an emergency)

If necessary, brief pool users in advance regarding rules (eg. no diving, running, etc.).

To communicate effectively with pool users.

To anticipate problems and prevent accidents.

To intervene to prevent behaviour which is unsafe.

To carry out a rescue from the water.

To give immediate first aid to any casualty.

The above must be accomplished in the context of the normal operating procedures and the emergency plan for the pool, which should be considered before swimming takes place. Full familiarisation of the systems described should be walked through at the pool.

Staff must be aware of the procedures in the event of an emergency, and who at the venue will provide back up. Staff should also know if they have exclusive use of the pool, as other pool users may increase the supervision role of your lifeguard.

If a young person holds an appropriate qualification then their role should be emergency lifeguard action, and supervision should remain the responsibility of the LA establishment's staff.

### **Open water swimming** (ie not in a swimming pool and not a 'water-margin' activity)

LA Support for approval is required via EV forms

Particular consideration should be given to the following factors:

Unknown locations and hazards, especially overseas.

Changing environmental conditions.

Supervisor complacency.

Adherence to local advice.

Preparation and knowledge of young people, ie. is it a planned activity?

The designated lifeguard must be dedicated exclusively to the group, and the location used must fall within the RNLI/RLSS definition of a 'safer bathing area'. Local advice must always be sought.

For free swimming activity

A valid National Beach Lifeguard Qualification (NBLQ) or equivalent in the country visited, see

[www.lifesavers.org.uk](http://www.lifesavers.org.uk) Note: this is for beach/sea only, not inland water. **or**

For structured or programmed activity

A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC) or equivalent - see [www.lifesavers.org.uk](http://www.lifesavers.org.uk) **or**

A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement. (available from 2013) see [www.lifesavers.org.uk](http://www.lifesavers.org.uk)

Refer to relevant section/s of National Guidance

### **Open-country activities**

For the purposes of LA approval, 'open-country' is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the LA if you think this might apply. Open-country activities are regarded as 'adventurous' and therefore these visits requires LA support. The responsibility for the safety of participants in an adventurous activity will rest with either:

#### **a) An external provider -**

The provider must hold an *LOtC Quality Badge* or complete a *Provider Form*

Note: If a Provider holds an *AAALA licence* (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required.

Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.

**or**

#### **b) A member of your establishment's staff - see below**

This person must be specifically approved by the establishment and NGB qualified to lead the activity

The following minimum levels of technical competence apply where a member of the establishment's own staff intends to lead an open-country activity:

a) For leaders of walking groups outside the UK or Ireland, please contact the LA for further guidance.

b) For leaders of walking groups in mountainous terrain within the UK and Ireland

- Mountain Leader Award (Summer or Winter as appropriate) [www.mltuk.org](http://www.mltuk.org) **or**

- A written statement of competence by an appropriate technical adviser

c) For leaders of walking groups in summer conditions in non-mountainous hilly terrain

(Known variously as upland, moor, bog, hill, fell or down), with well defined obvious boundaries, such as roads and coastlines, and where any hazards within it are identifiable and avoidable, and where wild camping or movement on steep ground is not involved.

- Walking Group Leader Award [www.mltuk.org](http://www.mltuk.org) **or**

- A written statement of competence by an appropriate technical adviser

d) For leaders of walking groups in terrain 'easier' than that defined in c)

The leader must demonstrate an appropriate level of competence. This may include one or more of the following:

Countryside Leader Award. See [www.countrysideleaderaward.org](http://www.countrysideleaderaward.org)

Sports Leaders UK Level 2 Award in Basic Expedition Leadership (BEL).

See [www.bst.org.uk](http://www.bst.org.uk)

Completion of a suitable 'Leader Training' Course.

A written statement of competence by an appropriate technical adviser

Evidence of recent, relevant experience, appropriately corroborated.

An assessment of competence (written or implied) by the Head of Establishment.

Staff who wish to **lead** (ie. supervise or instruct) an adventurous activity, as defined above, must submit details and scanned copies of all relevant qualifications (eg instructor certificates, first aid, etc) to the school/establishment EVC

The visit leader should complete the Visit Forms as usual. During this process EVC will ask for an Activity Leader Form/Summary to be completed, which will request further details regarding the proposed venture (eg dates, venues, numbers, etc).

On receipt of Visit Forms, the Establishment and LA will view the proposed activity in the context of the leader's competencies and qualifications.

Where support for approval is not granted to lead the activity, a response will be returned to the EVC via email with an attached note. Where this is the case the activity must not take place.

### **Criteria for approval**

Approval will normally be given where the leader of the activity has recent relevant experience, and:

- is appropriately qualified through the relevant National Governing Body, **or**
- has a 'Statement of Competence' from an appropriate 'technical adviser' – see below.

For most activities the competence required of a technical adviser is stipulated by the activity's National Governing Body. For further clarification regarding a technical adviser 'Statement of Competence' please contact the LA.

In some cases approval may be granted where no qualification is held, but the person concerned is deemed by the Establishment and LA to have a sufficient level of competence in addition to recent relevant experience.

In cases where no National Governing Body exists, the Establishment and LA will make a decision based on factors which may include: technical advice, the leader's stated competence, observed competence, past experience, and attendance at training courses. Approval will always be subject to a requirement that the leader must act at all times within the remit of his/her qualifications, and in accordance with National Governing Body Guidelines where these exist. Approval may also be subject to other conditions which will be specified by the LA on the Visit Form.

Where there is insufficient information for the LA to make a decision regarding approval, then the applicant may be asked to provide further information (eg evidence of awards, experience, and log book details, etc). In some cases a meeting with the applicant may be requested by the LA. Approval to lead an adventurous activity is specific to the technical aspects of the adventurous activity detailed. It is not an indication in respect of other aspects of the visit such as general management and supervision skills, the assessment of which may be the responsibility of Head of Establishment and/or EVC.

### **Snowsports**

Snowsports (eg skiing and snowboarding) are regarded as adventurous activities, and the visit therefore requires LA support.

There are advantages to snowsports taking place during term time as opposed to during the establishment holiday period. These include: greater choice generally, less queueing for lifts, less crowded slopes therefore less chance of collisions occurring, less crowded resort, higher possibility of 'sole use' of accommodation, lessons more likely to be conducted by permanent snowsport establishment instructors (as opposed to 'casual' instructors), greater

likelihood of English speaking instructors, considerable cost savings through avoiding high season (possibly allowing more young people to participate), etc. A member of staff intending to organise a snowsport visit (but not instruct, lead or supervise on snow) should hold the Snowsport Course Organiser Award (SCO), administered by Snowsport England [www.snowsportengland.org.uk](http://www.snowsportengland.org.uk) and must have previously accompanied at least one educational snowsports visit.

Young people may only participate in snowsports when under the direction of an appropriately qualified and competent person. This would normally be an instructor employed by the local snowsports school.

Establishments should therefore consider the merits of fully instructed lessons of 4/5 hours duration per day. A member of staff intending to lead skiing or snowboarding (ie. not using a ski school instructor) must be qualified as below and have been approved by the LA

**Skiing:** The minimum qualification to lead skiing on snow is:

The Alpine Ski Course Leader Award (ASCL) [www.snowsportengland.org.uk](http://www.snowsportengland.org.uk) **or**

The Alpine Ski Leader Award (ASL) [www.snowsportscotland.org](http://www.snowsportscotland.org) **or**

A statement of competence by an appropriate 'technical adviser'

**Snowboarding:** The minimum qualification to lead snowboarding on snow is:

The Snowboard Leader Award (SBL) administered [www.snowsportscotland.org](http://www.snowsportscotland.org) **or**

A statement of competence by an appropriate 'technical adviser'

See LA guidance for the current good practice guidance on helmets for snowsport activities.

Pupils may only take part in off-piste activities if:

under the direction of a suitably qualified local instructor, AND

they will remain within the designated controlled areas, AND

off-piste activities are specifically included within the visit insurance policy, AND

a NOTE is added to Visit Forms in advance of the visit, confirming that the above criteria are/will be complied with.

**Important:** Owing to unacceptable liability waiver requirements, currently LA establishments must not use the following resorts: Vail, Beaver Creek, Breckenridge, Keystone and Heavenly Lake Tahoe, until further notice. For other resorts in USA or Canada, the establishment must check the liability position prior to making a commitment.

Refer to relevant section/s of National Guidance

### **Farm Visits**

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

Refer to : *'Preventing or controlling ill health from animal contact at visitor attractions - Advice to Teachers'* and associated documents.

Refer to Farming & Countryside Education: [www.face-online.org.uk](http://www.face-online.org.uk)

Refer to relevant section/s of National Guidance

### **Overseas Expeditions and Visits**

Overseas Expeditions (for the purposes of this document) are defined as those which typically involve journeying in remote areas of the world and/or in developing countries. There are stringent requirements on Overseas Expedition providers, and establishments may therefore need to allow up to 18 months for LA approval to be granted. A 'Note' (for the attention of the LA) should be added to the Visit Form as soon as possible during the planning stages. Overseas Expeditions will only be approved by the local authority if the provider either:

a) Holds an LOtC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk) **or**

b) Provides a statement of compliance with *Guidance for Overseas Expeditions, Edition 3*

For providers that do not hold an LOtC Quality Badge, 'Guidance for Overseas Expeditions, Edition 3'

should be referred to when the proposal is initiated. This document contains information for both establishments and providers, and includes a checklist of vital aspects that **must** be considered prior to the establishment making a commitment with an external provider. Overseas expedition providers are required to comply with the minimum standards specified in this document. When planning an expedition and selecting a provider, establishments should particularly consider the educational aims of the venture, that appropriate progression takes place, and that the requirements relating to 'Best Value' are met.

Visit leaders may find it beneficial to attend the one day course entitled 'Overseas Expeditions and Fieldwork: a Course for Teachers and Youth Leaders' organised by the Royal Geographical Society  
[www.rgs.org/eac](http://www.rgs.org/eac)

Refer to relevant section/s of National Guidance

**For all Overseas visits** it is essential that consideration is given to the following:

Culture: food and drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information, alcohol & drugs. Accommodation: checked for suitability, security, safety precautions and emergency evacuation.

Transport systems have been assessed as safe for use.

The visit leader should consider the relevant country information from the Foreign and Commonwealth Office website: [www.fco.gov.uk](http://www.fco.gov.uk) ('Home' page, 'Travel & Living Abroad', 'Travel Information by Country').

All relevant FCO information should be circulated amongst the staff team.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC (European Health Insurance Card). See [www.dh.gov.uk](http://www.dh.gov.uk)

**For exchange visits:**

The LA has adopted the Outdoor Education Advisers' Panel guidance document: *Young People's Exchange Visits* LA establishments are required to adhere to all relevant aspects of this guidance.

Refer to the British Council (Learning) [www.britishcouncil.org](http://www.britishcouncil.org)

Refer to relevant section/s of National Guidance

## 17. Good Practice Requirements

To be deemed competent, a Newcastle City Council Visit / Activity Leader, or Assistant Leader must be able to demonstrate *the ability to operate to the current standards of recognized good practice for that role*. All staff and helpers must be competent to carry out their defined roles and responsibilities. LOtC Employer Guidance sets a clear standard to which Newcastle City Council leaders **must** work. The guidance states:

*"a competent Visit /Activity Leader (or an Assistant Leader where they may take sole responsibility for a sub-group) requires:*

- Knowledge and understanding of their employer's guidance supported by establishment-led training. It is good practice for employers to provide formal and accredited training to support their guidance e.g. EVC Training, Visit Leader Training and such training may be a requirement prescribed by some employers.*
- 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*
- In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification."*

Staff participating in off-site activities and visits must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with the above

guidance. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff. Establishments should view the original documents and certificates when verifying leader's qualifications, and not rely on photocopies. Where a Volunteer Helper is a parent (or otherwise in a close relationship to of a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise the Visit Leader's plans for group management. The Visit Leader should directly address this issue as part of the Risk-Benefit assessment.

Refer to LOtC EG document: "**Good Practice Basics**"

## **18. Transport**

Careful thought must be given to planning transport to support off-site activities and visits. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it and establishments **must** follow the specialist guidance provided in Newcastle City Council transport policy. All national and local regulatory requirements **must** be followed. The level of supervision necessary should be considered as part of the risk management process when planning the journey, giving proper consideration to issues of driver-distraction when considering what supervision is required for the specific group of passengers being transported in a minibus.

The Visit Leader should ensure that coaches and buses are hired from a reputable company.

### **Private cars**

Where a private (staff or parent) car is to be used to transport young people then this must be approved by the Head of Establishment, and a school initiated record must be completed and retained by the establishment on an annual basis. This should show that driving licences are checked and validated.

### **Coaches**

The LA does 'approve' coach companies' Contact the LA for up to date registration lists.

### **Minibuses**

Establishments that own or hire a minibus must have an operational policy in place for this. For further information, see also:

Refer to OEAP document: *Transport in Minibuses*

DVLA [www.dvla.gov.uk](http://www.dvla.gov.uk) Select 'Online leaflets', INF28 'Driving a minibus'

ROSPA 'Minibus Safety: A Code of Practice' 2008

MiDAS (Minibus Driver Awareness Scheme) via Community Transport Association UK This also contains information on PCV licences, weight limits and towing.

Schools should ensure that it is strongly recommended for all drivers of minibuses to undertake MiDAS or similar recognised training, and keep that training and driving experience current. This applies to pre & post 1997 licence holders operating under the section 19 permit scheme as 'volunteer drivers'. Post

1997 licence holders may drive a minibus provided:

Drivers are aged 21 years or over.

They have held their category B driving licence for at least two years.

The minibus is being used by a non-commercial body for social purposes, but not for hire or reward.

Drivers are not being paid to drive the minibus, other than out-of-pocket expenses.

The minibus does not exceed 3.5 tonnes (or 4.25 tonnes if specialised equipment for the carriage of disabled passengers is included) gross vehicle weight.

No trailer is towed.

If any of the above provisions are not met, then a full D1 PCV is required.

Transporting young people in private cars requires careful consideration. Where this occurs, there should be recorded procedures.

Refer to LOtC EG document: “**Transport: General Considerations**”

Refer to LOtC EG document: “**Transport in Minibuses**”

Refer to LOtC EG document: “**Transport in Private Cars**”

## 19. Planning

Planning should reflect the consideration of legal and good practice requirements, ensuring:

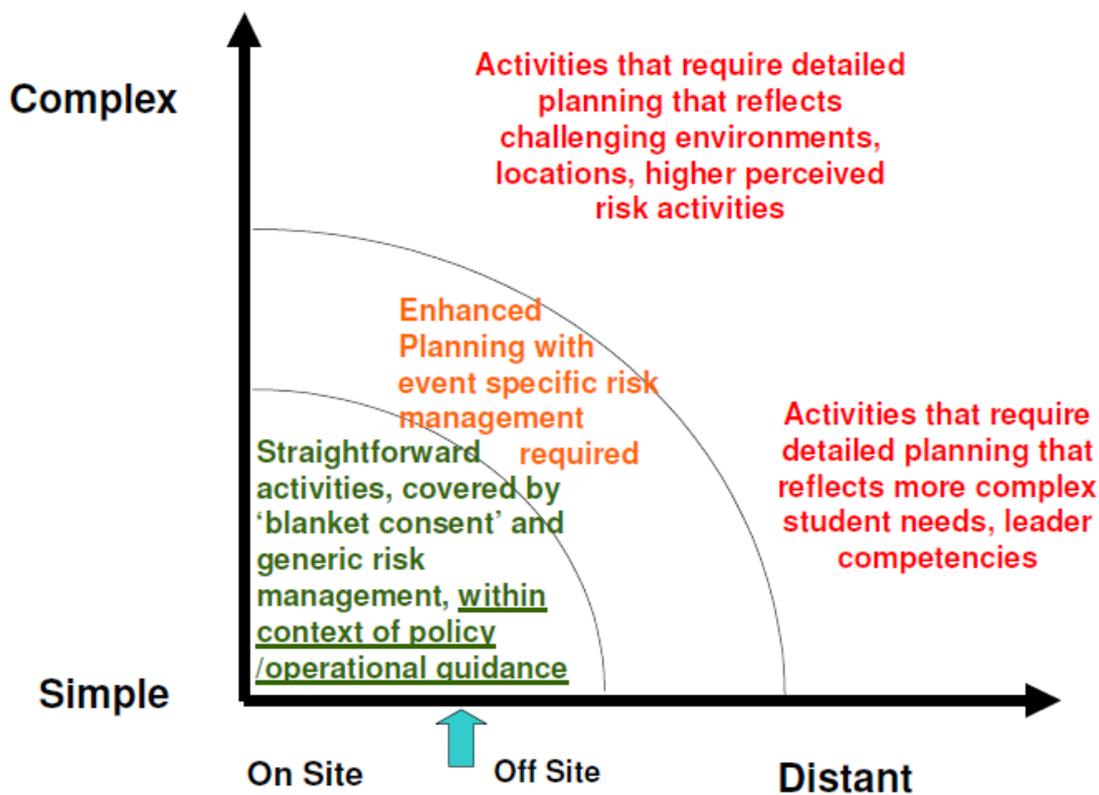
- The plan is based on establishment procedures and employer guidance.
- All staff (including any adult volunteer helpers) and the young people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk management process.
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained.
- Proportionate assurances have been obtained from any providers (making full use of national schemes that accredit that assurances have already been obtained by credible inspection regimes).
- Designated emergency contact(s) have been identified that will work on a 24/7 basis where required.
- All details of the activity provision are accessible to the emergency contact throughout the period of the activity.

It is strongly recommended that at a very early stage of the planning process, the provisional staffing team carry out a brain storming exercise in order to identify the benefits and learning outcomes that the activity (or range of activities) might achieve. If the outcomes are to be evaluated with any rigor (an Ofsted expectation), then it will be essential that these outcomes are prioritised, and appropriately targeted. A record of these outcomes will help keep the plan focussed and also be a vital part of the risk management process in providing some objectivity in a “Risk Benefit Analysis”. Once the targeted outcomes have been recorded, it will then be possible to identify appropriate on-going review and evaluation strategies, including indicators.

To reduce bureaucracy and encourage activity, establishments need to take account of the legalities regarding a requirement for formal consent. When an activity is part of a planned curriculum in normal curriculum time and no parental contributions are requested, then a formal consent is not necessary.

However, in the interests of good relations between the establishment and the home, it is good practice to ensure that those in a position of parental responsibility are fully informed. This supports the move towards developing activity-specific policies at establishment level for regular or routine activities. Such policies should be robust and equate to “*operational guidance*” that makes it clear how the activity should be planned and delivered, meeting all necessary recommendations and requirements, as well as assuring educational quality. The degree of complexity of a particular plan or policy (along with its supporting procedures) will need to reflect the nature and complexity of several variables that can impact on any given activity. These variables can be remembered as “**SAGED**” as explained below.

- S**taffing requirements – trained? experienced? competent? ratios?
- A**ctivity characteristics – specialist? insurance issues? licensable?
- G**roup characteristics – prior experience? ability? behaviour? special and medical needs?
- E**nvironmental conditions – like last time? impact of weather? water levels?
- D**istance from support mechanisms in place at the home base – transport? residential?



Refer to LOtC EG document: "*Planning Basics*"

Refer to LOtC EG Power Point: "*Planning Visits Off-site Activity and LOtC*"

### Off Site

Refer to LOtC EG document: "*Planning Basics*"

Refer to LOtC EG Power Point: "*Planning Visits Off-site Activity and LOtC*"

### 20. The Value and Evaluation of LOtC

The Ofsted report "*Learning Outside the Classroom – How Far Should You Go?*"

(October 2008) makes statements in the strongest terms to support the value of LOtC, including the fact that it raises achievement. Newcastle City Council Heads, Managers, EVCs and Visit Leaders are strongly recommended to familiarise themselves with the main content of this report. Refer to LOtC EG document: "*Ofsted and LOtC Summary*"

However, it also highlights the finding that *even where LOtC is highly valued and provided to a high standard, it is rarely evaluated with sufficient rigor* – i.e. in the way that classroom learning is evaluated – and a methodology to address this is provided within the LOtC Employer Guidance document:

***"Rigorous Evaluation of LOtC: Meeting Ofsted Expectations and Assuring Quality"***.

### 21. Emergency Procedures

Establishments should ensure that their Health and Safety policy includes off-site visits.

Staff involved in a visit must be aware of and adhere to their establishment's policy on emergency procedures. For visits that take place outside normal establishment hours:

A completed *Emergency Card – Visit Leader* (or equivalent) must be with the Visit Leader at all times,

**and**

A completed *Emergency Card – Home Contacts* (or equivalent) must be with the emergency home contact(s) at all times, where access to remote computer access is not possible. In an emergency, if it is not possible to reach any of the designated establishment emergency contacts, the leader should call the emergency duty 24 hour number

## **22. Contacts (confidential)**

### **Business Continuity and Resilience Team - Schools**

Key officers: Margaret Curry, Alan Buick and Ash Des-Forges

Phone: 0191 2774410 or 0191 2774414

Email: [margaret.curry@newcastle.gov.uk](mailto:margaret.curry@newcastle.gov.uk)

Emergency Duty Phone (24 hours) 07736372567

### **Health and Safety**

Key Officer: Simon Hoban

Phone: 0191 2115222

Email: [simon.r.hoban@newcastle.gov.uk](mailto:simon.r.hoban@newcastle.gov.uk)

### **Martin Surtees, Assistant Director, Education**

Phone: 0191 2115300

Email: [martin.surtees@newcastle.gov.uk](mailto:martin.surtees@newcastle.gov.uk)

### **Jan Corlett, Principal Adviser, School Improvement**

Phone: 0191 2115391

Email: [jan.corlett@newcastle.gov.uk](mailto:jan.corlett@newcastle.gov.uk)

### **Marcus Tinsley, Educational Visits Adviser**

Phone 0191 2741684

Mobile 07795323848

E-mail [marcus.tinsley@broadwood.newcastle.sch.uk](mailto:marcus.tinsley@broadwood.newcastle.sch.uk)

Email: [educational.visits@newcastle.gov.uk](mailto:educational.visits@newcastle.gov.uk)