

Ormiston Academies Trust

Ormiston Sudbury Academy

Management of off-site visits and related activities policy

Policy version control

Policy type	OAT Mandatory
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Approved by	Paul Nye, August 2019
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Description of changes	<p><i>Section 2: Provision of Guidance by the Employer</i> Section updated (2.2) to include OAT Guidance for Managing Incidents, Emergencies and Critical Incidents during Off-site Visits and Related Activities. Minor changes to the following sections have been made to recognise the new guidance (2.2) above: 1.3.1; 1.4; 2.4; 2.5; 2.6</p> <p><i>Section 3: Ormiston EVOLVE (https://oatvisits.org.uk)</i> The title has been amended to include the change in domain name for O.EVOLVE. Section 3.2: The wording has been amended to clarify OAT's requirements for all academy staff with involvement in off-site visits.</p> <p><i>Section 4: Role Specific Requirements</i> Section 4.1 has been updated to clarify the role of the EVC with respect to any administrative support they receive (4.1.1) and where more than one EVC has been appointed in an academy (4.1.2). Section 4.2 is a new section which enables Principals to delegate authorisation of visits to a senior member of staff (4.2.1) and to include OAT's requirement for the</p>

	<p>EVC scrutinising and submitting the visit for approval not to be the same person who authorises the visit under delegation from the Principal (4.2.2).</p> <p>Section 4.3 (formerly 4.4) has been updated to require the designated Visit Leader to accompany the visit (4.3.1) and for a Visit Leader to be identified for unaccompanied visits (4.3.2).</p> <p><i>Section 6: Notification and Approval of Off-site Visits and Related Activities</i></p> <p>Section 6.5 has been amended to state OAT's requirement for all visits to be authorised before their departure date.</p> <p><i>Section 7: Monitoring</i></p> <p>Section 7.2 has been amended to include monitoring of visits in progress.</p> <p><i>Section 8: Risk Management</i></p> <p>Section 8.1 now includes a cross reference to OAT Guidance section 7.</p> <p>Section 8.2 has been amended to clarify the roles of the Visit Leader and EVC in relation to risk management tasks.</p> <p><i>Section 9: Training</i></p> <p>Section 9.1 has been amended to clarify OAT's requirements with respect to EVC training.</p> <p><i>Section 11: Management of Incidents, Emergencies and Critical Incidents</i></p> <p>This section has been renamed and revised following the introduction of the OAT Guidance for Managing Incidents, Emergencies and Critical Incidents during Off-site Visits and Related Activities.</p>
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The current versions of this policy, the OAT Guidance for Off-site Visits and Related Activities and the OAT Guidance for the Management of Incidents, Emergencies and Critical Incidents during Off-site Visits and Related Activities, may be downloaded from the OAT Guidance section of the Ormiston EVOLVE, Resources document area.

Where these documents and any other OAT document, form or checklist referenced in them, are stored elsewhere either in electronic or hard-copy formats, it may not be possible to ensure that they will remain the most up to date versions. It is therefore recommended that, when required, all OAT documents are referenced and/or downloaded directly from the Ormiston EVOLVE Resources area.

1. Scope and Remit

1.1. This policy and associated guidance (Section 2) applies to Ormiston Academies Trust employees, contractors and volunteers whose work involves any one of the following, regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods:

- 1.1.1. direct supervision of young people undertaking experiences beyond the boundary of their normal operational base;
- 1.1.2. facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base;
- 1.1.3. deploying staff who will supervise or facilitate experiences of, or for, young people undertaking experiences beyond the boundary of their normal operational base;

1.2. This policy and associated guidance does not incorporate the following:

- 1.2.1. Where establishments operate on a split site, the movement of staff and young people between sites;
- 1.2.2. Work experience as defined in the publication "Work Experience: a guide for secondary schools" (DfES 2002);
- 1.2.3. Physical Education activities, led by OAT employees, that do not fall within the scope of Adventurous Activities, as defined in the Employer Guidance (Section 21). The activity supervision should be that required or recommended by specialist PE guidance, such as that provided by the Association for Physical Education (AfPE). The journey to and from the venue and any Adventurous Activities and activities provided by third parties are covered by this policy and associated guidance.

1.3. As the employer, Ormiston Academies Trust will provide:

- 1.3.1. appropriate guidance relating to off-site visits and activities (2.1, 2.2, 2.3, 2.4);
- 1.3.2. access to training courses to support the guidance to ensure that it is understood (9.1, 9.2, 9.3);
- 1.3.3. suitable systems and processes to ensure that those trained are kept updated (5.1, 5.2);
- 1.3.4. access to advice, support and further training from appointed Advisers, who have expertise and professional understanding of the guidance, the training and expectations set by current good practice (5.3, 5.4, 5.5).

1.4. The following terms may be used in this policy and associated guidance (2.1, 2.2, 2.3):

- 1.4.1. *Off-site visits and activities* will include the following that take place beyond the boundaries of the establishment site: educational visits; Learning Outside the Classroom (LOtC); outdoor learning.
- 1.4.2. An *Educational Visits Co-ordinator (EVC)* is an appropriately competent OAT employee appointed to ensure that all off-site activities meet the requirements of their employer's policy and guidance, as well as the requirements of establishment policy and procedures.
- 1.4.3. A *Leader* is any adult with supervisory responsibilities for young people on an off-site visit;
- 1.4.4. A *Visit Leader* is an accountable person (employed, contracted or a volunteer), engaged through a thorough recruitment process, with overall responsibility for an off-site visit;
- 1.4.5. *Establishment* refers to an Ormiston Academies Trust (OAT) academy.

See also OEAP National Guidance:

Section 1c: Status, Remit and Rationale
Section 3.4: Roles & Responsibilities

2. Provision of Guidance by the Employer

- 2.1. OAT Guidance for Off-site Visits and Related Activities (referred to as Employer Guidance) states the requirements of the employer and links to Ormiston EVOLVE. Where guidance is a recommendation rather than requirement, this will be clearly stated as such.
- 2.2. OAT Guidance for Managing Incidents, Emergencies and Critical Incidents on Off-site Visits and Related Activities (referred to as Incident Management Guidance) states the requirements of the employer in the event of an incident occurring on an offsite visit or related activity.
- 2.3. OAT recognises The Outdoor Education Advisers' Panel: Guidance for the Management of Outdoor Learning, Off-site visits and Learning Outside the Classroom (referred to as OEAP National Guidance), as the definitive source of best-practice guidance.
- 2.4. OAT employees, volunteers and contractors must follow the requirements of this policy, Employer Guidance (2.1), Incident Management Guidance (2.2), OEAP National Guidance (2.3), and relevant establishment policies (2.6).
- 2.5. The definitive versions of this policy, Employer Guidance (2.1) and Incident Management Guidance (2.2), may be found in the Resources area of the Ormiston EVOLVE website under the [OAT Policy & Guidance] tab. The most up to date version of the OEAP National Guidance is available at <https://oeapng.info>
- 2.6. All OAT establishments are required to have a suitable policy for the management of all off-site visits and related activities, which includes a clear reference to compliance with this policy, the Employer Guidance, Incident Management Guidance and OEAP National Guidance. The definitive version of the establishment's policy should be available from the [Establishment Docs] tab in the EVOLVE Resources area.

For an explanation of legal expectations, all users of this policy are recommended to read the *OEAP National Guidance* document: [Section 3.2a: Underpinning Legal Framework and Duty of Care](#)

3. Ormiston EVOLVE (<https://oatvisits.org.uk>)

3.1. EVOLVE is a web-based system that provides the following:

- 3.1.1. An online Notification and Approval system for visits;
- 3.1.2. Definitive versions of OAT Policy & Guidance for Off-site Visits and Related Activities;
- 3.1.3. Definitive versions of OAT forms and documents, referenced in the Employer Guidance and essential for the visit process;
- 3.1.4. Definitive versions of establishment forms and documents, essential for the visit process;
- 3.1.5. Best-practice forms and documents that may be adapted by establishments to support the visit process;
- 3.1.6. Links to important national documents referenced in the Employer Guidance;
- 3.1.7. Search and Reporting facilities.

3.2. All staff involved in the visit process must be given an appropriate personal EVOLVE account to enable them to access: key policies; employer and national guidance; good-practice forms and documents; the notification and approval process for visits.

4. Role-specific Requirements

4.1. Each establishment is required to have an Educational Visits Co-ordinator (EVC) in place who, through experience and training (see 9.1.1), is appropriately competent to fulfil that role in their establishment.

- 4.1.1. The EVC may receive administrative support but remains responsible for scrutinising visit approval requests and either the subsequent submission of visit approval forms to the Principal (or the delegated deputy) or return of the visit form to the Visit Leader.
- 4.1.2. Where more than one EVC is identified or an EVC receives administrative support, the respective roles of those involved must be understood and clearly stated in the Establishment Off-site Visits policy.

4.2. Authorisation of off-site visits is the responsibility of the Principal. The Principal may delegate authorisation to a senior member of staff.

- 4.2.1. An EVC who has previously scrutinised a visit and submitted it for authorisation, should not also authorise that visit under delegation by the Principal.

4.3. Every off-site visit must have a designated Visit Leader.

- 4.3.1. The Visit Leader must be a Leader who is accompanying the visit.
- 4.3.2. Where a visit is to be unaccompanied, a Visit Leader must be designated and identified on the visit form with a Note clearly stating the visit is to be unaccompanied.
- 4.3.3. Joint Visit Leaders are not permitted, though, Deputy Visit Leader(s) may be appointed as required.

- 4.4. The establishment policy for off-site visits and related activities should outline the roles and responsibilities of the key stakeholders in the visit process: Governing Body/Management Board; Principal; EVC; Visit Leader; Leader; Volunteer; those in a position of Parental Authority.
- 4.5. Stakeholder roles and responsibilities should reflect those detailed in OEAP National Guidance: Section 3.1b Requirements and Recommendations for Establishments.
- 4.6. Establishments are required to ensure that all Visit Leaders and Leaders have been assessed as competent and confident to undertake responsibilities they have been assigned in line with OEAP National Guidance: Section 3.2d Assessment of Competence.

See also *OEAP National Guidance: Section 3.4: Roles & Responsibilities*

5. Advice and Support

- 5.1. The EVOLVE Resources area contains links and downloadable documents that provide a comprehensive range of information from key sources.
- 5.2. For the purposes of day-to-day updating of information, EVCs and Visit/Activity Leaders are directed to the posting of *EVC Update*, an occasional newsletter, in the EVOLVE Resources area.
- 5.3. Where an employee experiences problems finding specific material, or requires clarification or further help and guidance, they must contact their establishment's Educational Visits Coordinator (EVC), in the first instance.
- 5.4. If the EVC is unable to resolve a problem, they should contact the OAT Off-site Visits Adviser.
- 5.5. The OAT Off-site Visits Adviser is:

Ken Hutson
Offsite Education Limited
enquiries@offsite-education.co.uk
01482 632529 / 07748 763368

6. Notification and Approval of Off-site Visits & Related Activities

- 6.1. The OAT procedure for the notification and approval of off-site visits and related activities may be found in Appendix 1. of the OAT Guidance for Off-site Visits and Related Activities (Employer Guidance).
- 6.2. Establishments are required to notify and seek OAT approval for the following types of visits, in accordance with the procedure in 6.1: those extending beyond the UK (Overseas); those

involving one or more overnight stays (Residential); those involving Adventurous Activities as defined in Section 21 of the Employer Guidance (Adventurous).

- 6.3. OAT will require at least 15 working days notice for visits described in 6.2.. For overseas visits and those involving complex arrangements, staff must be prepared to discuss such visits with OAT well in advance, possibly 12 months before the departure date. The OAT Off-site Visits Adviser should be consulted about such visits during the early planning stage and before a financial or contractual commitment is made with any third party provider.
- 6.4. Approval of all other types of visits and activities is delegated to establishments.
- 6.5. Establishments are required to record, notify and authorise visits and activities described in 6.4, in advance of the departure date of the visit, in accordance with the procedure in 6.1.

7. Monitoring

- 7.1. The responsibility for monitoring the implementation of this policy and associated guidance is delegated to establishments.
- 7.2. Monitoring should be carried out through systems put in place by the establishment Principal and EVC in accordance with OEAP National Guidance: Section 3.2b Monitoring. This will include monitoring, on a sample basis, visits in progress (sometimes referred to as field monitoring).
- 7.3. OAT will monitor selected visits and activities.

See also OEAP National Guidance: [Section 3.2b Monitoring](#)

8. Risk Management

- 8.1. Risks are expected to be reduced to an acceptable or tolerable level, but not necessarily eliminated. Planning should achieve a rational balance between potential adverse risks and the intended benefits and outcomes of the activity in accordance with Section 7 of the Employer's Guidance.
- 8.2. Risk management tasks are delegated to establishments and should be carried out by the Visit Leader (and Leaders) with the support of EVCs and other colleagues as required.
- 8.3. Establishments should arrange training for staff in risk management, as required. See Section 9.

See also OEAP National Guidance: [Section 4.3c Risk Management](#)

9. Training

9.1. OAT recognises, requires and recommends, as appropriate, the following basic training courses for visit stakeholders:

9.1.1. Educational Visits Co-ordinator (EVC) Training;

- 9.1.1.1. All EVCs must have undergone training (min. 6 hours) from an OAT approved provider;
- 9.1.1.2. Where the training (9.1.1.1) was not provided by OAT, full details of the course completed must be presented to the OAT Off-site Visits Adviser for approval and record-keeping purposes. This training must have taken place within the three years preceding the appointment of the EVC to the role. Where an EVC has not previously received training (9.1.1.1) or training was received over three years prior to appointment, the establishment must arrange for the EVC to receive training (9.1.1.1 and 9.1.1.3) within 3 months of their appointment.
- 9.1.1.3. OAT recommends that EVCs are trained by the OAT training provider. Where the training will not be provided by OAT, the course must be authorised in advance by the OAT Off-site Visits Adviser.

9.1.2. EVC Update Training;

- 9.1.2.1. Update training (min. 3 hours) should be completed by EVCs at least every 3 years following full EVC training (9.1.1). OAT will arrange EVC conferences to facilitate this requirement.
- 9.1.2.2. Update Training is subject to the provisions outlined in 9.1.1.1, 9.1.1.2 and 9.1.1.3.
- 9.1.2.3. EVCs will also be kept up to date on an ad hoc basis by the OAT Off-site Visits Adviser via mailings and/or meetings.

9.1.3. Leader Training;

- 9.1.3.1. Leaders are required to be appropriately competent to fulfil their responsibilities. This will require them to be current in their knowledge of good practice and be able to apply it when planning and leading visits.
- 9.1.3.2. Leaders and particularly Visit Leaders are recommended to complete Leader Training (min. 6 hours), from an OAT approved provider, which includes the OEAP core messages for those leading off-site visits and activities.
- 9.1.3.3. Leader Training is subject to the provisions outlined in 9.1.1.2 and 5.1.1.3.
- 9.1.3.4. The following training courses are also recognised for Visit Leaders in certain visit contexts:
 - Off-Site Safety Management, OSSM (Royal Geographical Society, RGS) – recommended.
 - Snowsports Course Organisers award, SCO (Snowsport England) – required (see Employer Guidance section 25)
 - Overseas Expeditions and Fieldwork Training (RGS) – recommended (see Employer Guidance section 26).

9.2. Identification of training needs and provision of appropriate training courses is delegated to establishments;

9.3. Further advice and information relating to training for off-site visit stakeholders may be obtained from the OAT Off-site Visits Adviser.

10. Insurance

- 10.1. Establishments purchasing insurance through the OAT Service Agreement are automatically insured for Personal Accident and Travel insurance;
- 10.2. Employer's and public liability policies are fully operative to indemnify the establishment in the event of personal injury claim being brought against the establishment;
- 10.3. Establishments should be aware of the limitations and exclusions stated in the policy and should arrange additional cover if necessary;
- 10.4. Establishments should not purchase insurance cover from third parties for activities and events that are already covered by the OAT policy (10.1);

See also OEAP National Guidance: Section 4.4c Insurance

11. Management of Incidents, Emergencies and Critical Incidents

- 11.1. Establishments must be familiar with and follow the OAT Guidance for Managing Incidents, Emergencies and Critical Incidents (see *Employer Guidance* Section 27).
- 11.2. Establishments should have written procedures in place to deal with incidents occurring on visits (see *Employer Guidance* Section 27).
- 11.3. Establishment managers must ensure they meet the requirements of the RIDDOR regulations and good practice.