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National and local guidance in relation to the Covid 19 pandemic may over rule aspects of this policy.

Policy for the Management of Educational Visits and Learning Outside the Classroom

STATUS: Approved

REVIEW DATE: September 2023

"The Academy believes that inclusive practice is central to developing quality teaching and learning. As such, we endeavour to provide a supportive framework that responds to pupils' needs and overcomes potential barriers for individuals and groups of pupils and to ensure that pupils of all abilities and needs are fully included in the life of the school. The ethos of this statement underpins all Oldbury Academy's policies."

Document Control

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This policy should be read in conjunction with other school policies as/where necessary.

Scope and Rationale

The Academy provides a rich and varied programme of opportunities for pupils to learn outside the classroom - on the school site, the local area and further afield. The programme of visits is structured and progressive to directly support the curriculum by providing different contexts for learning and applying skills and knowledge, and beyond the curriculum into the whole school life supporting SMSC, Personal development and cultural capital, to develop young peoples' confidence, independence, responsibility and specific learning objectives.

We believe that student and staff involvement in residential and non-residential visits adds significant value to school life and enhances our core values and ethos. First-hand experience adds breadth and depth to the Curriculum and enhances social, moral, spiritual and cultural development.

We aim to:

- Provide a broad programme of visits
- Ensure access for all students including those with additional and learning needs
- Develop continuity and progression throughout a student's school experience
- Enable students to discover a sense of community, social responsibility, initiative, resourcefulness and self-reliance

This policy covers all offsite visits and some on site learning outside the classroom. This policy is managed by the Head Teacher and a Trained Educational Visit Coordinator.

Provision of Guidance for staff planning visits

The Academy has formally adopted **the OEAP National Guidance (NG)** as the source of guidance, www.oepng.info

It is a legal expectation that employees **must** work within the requirements their employer's guidance; therefore, employees must follow the requirements of "National Guidance", set within the context of this policy.

Systems for Managing this Activity

Oldbury Academy has systems in place covering a range of key areas vital to the safe and successful delivery of offsite activity.

Specific Arrangements

The academy has a service level agreement for specialist advice from the Outdoor Education Adviser. The school has an Educational Visit Coordinator who is trained and remains up to date.

There is a clear process for planning and approval of visits, using Evolve software for Zone 2 and 3 visits. There is a defined process in place for Zone 1 visits.

Oversight for this system rests with the Head Teacher, with the Management/Trust receiving reports when appropriate and requested.

Insurance

The academy has insurance policies in place to cover this area of work. Specific activity may require further cover which should normally be with the insurers.

Managing Risks

The Academy has a legal duty to ensure that risks are managed - requiring them to be reduced to an "acceptable" or "tolerable" level. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring the school 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. A "Risk-Benefit Assessment" approach is adopted. 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". As part of learning, young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

Emergencies and Critical Incidents

The School Critical Incident plan is regularly reviewed and updated. It covers and manages the possibility of having to manage an offsite visit emergency. Senior staff who may have to implement the plan are trained and briefed. The Adviser service provides support and information, linked to the Visit Emergency Support Network, (VESN). An updated guide is available to schools to assist.

Monitoring

As an employer the school ensures that there is sample monitoring of the visits and outdoor activities undertaken by the staff. Such monitoring should be in keeping with the recommendations of National Guidance.

Links to other Key Policies

This policy links to other academy policies and therefore these areas are acknowledged and not repeated.

Staff

Staff Roles are defined on the NG website and staff taking on a specific role should read and understand the advice contained within defined documents associated with the role

Roles include, visit leader, assistant leader, EVC, Head and Governing Body and voluntary helpers.

Staff are judged as competent to lead visits by the EVC. For specialist activities led by Academy staff the Outdoor Education adviser will provide this guidance and advice. The EVC will lead on this process but may involve other senior staff.

Appendix 1 covers the qualifications required to lead Duke of Edinburgh's Award and other self-led Expeditions.

The EVC should view the original documents and certificates when verifying leader's qualifications, not rely on photocopies, and retain a copy. Advice can be sought from the Adviser.

Vetting

Staff deployed onto visits are subject to the schools safeguarding processes and arrangements.

Volunteers are also included.

Effective Supervision

The academy follows national guidance in that there are no specific and defined ratios for visits, but that the staff on the visit work to the principle of effective supervision at all times.

Working with outside providers

All visits must be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet your expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people. In most cases a provider must either supply an LOTCQB or an AALS License or complete the [Provider form](#)

Planning for Inclusion

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.

Good Practices

All staff and helpers must be competent to carry out their defined roles and responsibilities. National Guidance sets a clear standard to which the visit leaders **must** work. The guidance states: 'leaders are accountable, confident and competent to lead visits'.

Transport

Careful consideration should be given to this area. This policy supports groups travelling by the most appropriate means which can include, walking, public transport – buses, trains and tube, taxi and private cars, coach and aircraft. The NG website contains details to assist in planning for transport.

OEAP Guidance for Unaccompanied Expeditions **Adopted by Cambridgeshire County Council working with Academies.**

The Outdoor Education Advisers' Panel recognises the huge benefits that remotely supervised, unaccompanied expeditions e.g. DofE award, BTEC Public Services, GCSE Trekking, John Muir Award, field work trips and all other self-supported expeditions can bring to individuals and teams. These include leadership, teamwork, self-motivation, communication, confidence, resilience and consideration for others. Expeditions typically take individuals out of their comfort zones and provide a broad range of challenges for them. The sense of achievement from completing an expedition can be significant and profound.

This document provides a framework for the planning and supervision of self-supported expeditions and self-led activities (including day walks) in the terrain defined in this document.

Expedition staff teams should emphasise the benefits of all adults working as a team. However, it is good practice to have a lead Expedition / Visit leader who holds the overview of the whole expedition and an appropriately competent deputy.

Employers need to ensure that staff involved in remote lone working during expeditions are competent and aware of the safety implications including emergency procedure and relevant issues. Staff should ensure safe working practices.

Leader Competence

There are four recognised ways to demonstrate the competence of leaders

- 1) To hold the relevant qualification
- 2) To hold an equivalent qualification (uniformed services, overseas awards etc)
- 3) To have received appropriate in house training (verified by a technical expert)*
- 4) To be competent through experience (verified by a technical expert)* www.hse.gov.uk/pubns/psd/L77.PDF Paragraph 22-28

***A statement of competence written by an appropriately qualified technical adviser must provide evidence for options 3 & 4.**

The leader's competences need to be matched to the terrain in which the expedition teams will be working and the mode of travel used.

Deploying staff who do not hold NGB awards or Statements of Competence

Where an accompanying member of staff does not hold a relevant NGB Award, or does not have a current Statement of Competence from a suitable Technical Adviser, the Expedition Leader may determine the best use of such staff by taking into account additional training or awareness courses that have been undertaken. Examples of these are:

- Training Courses for NGB Awards - e.g. Mountain Training Awards (LL/HM/ML), Sports Leaders UK (LWL / LEL)
- Training Courses for AALA recognised Awards e.g. The Countryside Leader Award
- Training / Skills Based Courses such as the DofE Expedition Supervisor Course and the DofE Expedition Skills Course
- Training / Skills Based Courses provided by LA's and other organisations such as Uniformed and Voluntary organisations – Cadets / Scouts / John Muir Award etc.

The final decision on deployment of staff lies with the employer and judgements should be supported by robust Risk Management strategies, documentation and evidence of competence

In addition, there should be careful scrutiny of the suitability of the expedition and the safety cover provided by a competent person (E.g. the Outdoor Education Adviser).

Table 1: Roles and Responsibilities

	Name	Responsibilities	Competence
Staff assessed as competent (See Table 3)	Expedition/ Visit Leader	Responsible for the overall planning & management of the expedition including the deployment of assistant leaders and additional adults For all considerations please see: www.oeap.info 3.4 Visit Leader NOTE: For DofE expeditions: Refer to DofE Supervisor role description on www.dofe.org and www.oeapng.info OEAP National Guidance document 7B.	<ol style="list-style-type: none"> 1. See Table 3 below 2. OEAP visit leader training recommended/ mandatory dependent on employer requirements 3. Familiar with the area where expedition is taking place and competent to look after themselves in that environment.
	Assistant Leaders	Works under the direction of the Expedition/ Visit Leader to train and supervise the participants to the appropriate standard	<ol style="list-style-type: none"> 1. Need to be competent for the role assigned by the Expedition leader. 2. Must meet the criteria in Table 3 3. OEAP visit leader training recommended/mandatory dependent on employer requirements 4. Familiar with the area where expedition is taking place and competent to look after themselves in that environment
Support staff	Additional Support Staff	<p>May support the Expedition Leader/Assistant Leaders with training/supervision where appropriate</p> <p>Must operate under the supervision of the Expedition Leader/Assistant Leaders at all times</p> <p>Where Additional Support Staff are deployed, the Expedition Leader/assistant leaders will remain responsible for all groups</p> <p>Additional Support Staff are present only in a supporting role</p> <p>Additional Support Staff MUST NOT supervise the use of camping stoves unless they have been suitably trained and are overseen by an appropriately qualified person (eg the Expedition Leader)</p>	<p>Deployed by Expedition Leader:</p> <ol style="list-style-type: none"> 1. Staff with appropriate experience who have completed NGB Training (e.g. Lowland Leader training) 2. Staff with appropriate experience who have completed a DofE DES Course 3. Experienced walker with navigation skills, able to look after their own safety, and able to retrieve their situation in an emergency <p>Additional considerations:</p> <ul style="list-style-type: none"> • Experienced teacher/teaching assistant/youth worker/or similar • Prior knowledge of the group • Familiar with route and area used • Current First Aid qualification
	Adult Helper	<p>Works under the direction of the Expedition/ Visit Leader to carry out limited tasks that do not require the competences outlined in the Table 3 below.</p> <p>To support with:</p> <ul style="list-style-type: none"> • Welfare/behaviour/pastoral care • Logistics/transport/backup • Non-remote check points • Additional First Aid cover where qualified • Adult Helpers can also help with lone working scenarios & with staffing gender issues. 	<p>Assessed (by the EVC/ Organisation Head/Manager with advice from the Expedition/ Visit leader) as competent to support the activity.</p> <ol style="list-style-type: none"> 1. Undergone safeguarding checks (essential) 2. Prior knowledge of the group 3. Basic knowledge of the area 4. Ideally possess knowledge & understanding of First Aid

Table 2: Ratios of Adults to Young People.

A minimum of 2 adults must accompany an Expedition. If there are male & female participants, it is advisable to have a leader of each sex.

The following expedition staffing ratios are starting points for consideration based on risk assessment.

Staff Ratios on Unaccompanied Expeditions		
Terrain 1 (see Table 3)		
1 Team	1 Expedition Leader and either 1 Assistant Leader, 1 Additional Support Staff or 1 Adult Helper	
2 Teams	1 Expedition Leader and either 1 Assistant Leader or 1 Additional Support Staff	
3 Teams	1 Expedition Leader and 1 Assistant Leader	<ul style="list-style-type: none">• If 2 members of staff are supervising 3 or 4 teams, serious consideration must be given to the emergency plan should one member of staff be incapacitated or need to take a participant to hospital. In these instances, a third competent member of staff will be required in order to continue with the expedition as planned.• There will be some circumstances where an Assistant Leader (or an appropriate member of Additional Support Staff) may be necessary for <u>each</u> team. The risk assessment process will determine this.• (e.g. practice expeditions or where teams are working independently - different routes/large areas)
4 Teams	1 Expedition Leader and 1 Assistant Leader	
5 Teams or more	The minimum ratio of 1 Expedition Leader/Assistant Leader for every 2 teams must be maintained Eg. 5 teams require at least 2 Expedition Leader and 2 Assistant Leaders	
Terrain 2 & 3 (see Table 3)		
1 Team	1 Expedition Leader and either 1 Assistant Leader, 1 Additional Support Staff or 1 Adult Helper	
2 or more Teams	1 Expedition Leader and normally 1 Assistant Leader for each team (Consider whether a third member of staff is required in order to effectively manage an emergency situation)	
3 Teams	1 Expedition Leader and 2 Assistant Leader	<ul style="list-style-type: none">• In order to deal with Emergencies effectively a third competent member of staff is required where there are 3 or more teams operating There will be some circumstances (e.g. practice expeditions) where an Assistant Leader may be necessary for <u>each</u> team. The risk assessment process will determine this.
4 Teams	1 Expedition Leader and 2 Assistant Leader	
5 Teams (or more)	The minimum ratio of 1 Expedition Leader/Assistant Leader to 2 teams must be maintained E.g. 5 teams will require 1 Expedition Leader and 2 Assistant Leaders (additional Leaders may be required)	
Taken from AALA Guidance Note 5.13: Supervision of DofE Expeditions		
In licensable terrain:		
<ul style="list-style-type: none">• Where teams are operating independently (not in the same area / immediate vicinity) then each Assistant Leader deployed to supervise a team should hold a HML (or higher) or hold a statement of competence from an appropriate technical adviser• Where Teams are operating in close proximity then each assistant deployed to supervise a team would need at least a statement of competence from an appropriate technical advisor		

Expedition Leaders and their advisers should ensure that sufficient numbers of competent staff (see Table 3) are deployed to ensure effective supervision is in place at all times

Effective supervision is essential and the above table provides the minimum framework under which expeditions can take place.

Risk Management

Expedition/ Visit leaders and assistant leaders should consider all relevant factors before and during the expedition to inform the 'risk-benefit' assessment. This should include all-weather routes for expeditions in Wild Country as well as good-weather routes.

The proximity of the teams must be taken into account at all times as well as the starting and finishing points and the location of the check points. This must be part of the on-going risk management process.

See OEAP National Guidance: www.oeapng.info Section 4.3c Risk management – An overview, Section 4.3f Risk management- some practical advice and 4.3g Risk management – what to record and when.

All Expeditions must be approved/ scrutinised/notified by the appropriate Educational Visits Co- ordinator/Head Teacher/Manager/ Education Visit Adviser/ Employer.

Section 1: Walking Expeditions (summer conditions)*:

Table 3:

Terrain 1	Competence	First Aid
<p>Lowland Country</p> <p>Farmland, valleys and woodland with no hazardous terrain (e.g. cliffs, very steep slopes, water hazards etc.) and no more than 3km away from a key access points such as a car park, lay-by or populated area (any potential escape routes should also lie within Lowland Country).</p> <p>Walks must follow paths or tracks that are both marked on a map and clearly visible on the ground and that do not require navigation across untracked areas, and must use bridges or other recognised water crossing points.</p>	<p>Lowland Leader (LL) OR Lowland Expedition Leader (LEL)/Basic Expedition leader (BEL) OR Countryside Leader Award (CLA) OR a higher qualification OR</p> <ul style="list-style-type: none"> • Equivalent qualification • In house training with a statement of competence signed off by a technical adviser • Appropriate experience signed off by a technical adviser. 	<p>Minimum of 16hrs with an outdoor element recommended</p>
Terrain 2	Competence	First Aid
<p>Moorland Country</p> <p>Open, uncultivated, non-mountainous, high or remote country (known variously as upland, moor, bog, fell, hill or down), which should not require movement on steep or rocky terrain in either a planned or unplanned situation.</p> <p>Walks should be in areas enclosed by well-defined geographical or man-made boundaries such as classified roads (areas that merge with mountain regions without well-defined boundaries should be regarded as Mountain Country).</p>	<p>Hill and Moorland Leader Award (HML) Walking Group Leader (WGL) OR a higher qualification OR:</p> <ul style="list-style-type: none"> • Equivalent qualification • In house training with a statement of competence signed off by a technical adviser • Appropriate experience signed off by a technical adviser. 	<p>Minimum of 16hrs Required Outdoor element recommended</p>
Terrain 3	Competence	First Aid
<p>Mountain Country</p> <p>Wild country which may contain steep and rocky ground where walkers are dependent upon themselves for immediate help.</p>	<p>Mountain Leader Summer (MLS) or a higher qualification OR</p> <ul style="list-style-type: none"> • Equivalent qualification • In house training with a statement of competence signed off by a technical adviser • Appropriate experience signed off by a technical adviser. 	<p>Minimum of 16hrs Required Outdoor element recommended</p>

Please Note:

1. *In case of winter conditions refer to your outdoor education adviser for further advice before planning.
2. There is an additional camping module for Lowland Leader and Hill and Moorland Leader awards.
3. A 3 year first aid revalidation is required to keep all first aid qualifications valid.

When applying this guidance to DofE Expeditions please ensure you follow the DofE requirements:
<http://www.dofe.info/en/content/cms/leaders/resources-download/expedition-d...>

Remote Supervision

<http://www.mountain-training.org/walking/other/downloads> please click on walking and download 2016 remote supervision guidance PDF
www.oeapng.info Section 4.2a group management and supervision.

Emergency Planning

www.oeapng.info Section 4.1 all documents.

DofE Approved Activity Providers

Many schools now buy in leadership services (i.e. leaders with appropriate NGB awards) from Approved Activity Providers. If you engage the services of an AAP to deliver your expeditions, they must follow the requirements of this policy. An AAP should be providing competent instructors in accordance with this guidance and the qualification matrix.

If the expedition falls into the description of Terrain 1 (Table 3) the school's DofE Manager / Coordinator should:

- Check if the provider (AAP) holds a current Learning Outside the Classroom (LOtC) Quality Badge. <http://lotcqualitybadge.org.uk/search> and or an AALA Licence
- If the provider does not hold a LOTC quality badge - seek further evidence and assurances about safety and educational quality.
- Require the Provider/AAP to complete a Providers' Questionnaire (www.oeapng.info 8p)

If the expedition terrain falls into the description of Terrain 2 or Terrain 3 in Table 3, or if water sports are done on 'specified water' (that is the sea, tidal waters, inland waters more than 50 metres from the nearest land or on turbulent inland waters) then the AAP you engage should hold an Adventurous Activities Licensing Authority license. This license can be checked by using the provider search: http://www.aals.org.uk/aals/provider_search.php.

When engaging the services of an AAP, schools must remember that they retain the overall responsibility for their students on expedition at all times. It is good practice that there should be staff from the school/organisation in attendance on the expedition, particularly overseeing and supporting the pastoral care and welfare of students.

Section 2 – Cycling Expeditions Leader

Competence

The table below gives the qualification requirements for levels of terrain for cycling expeditions. These cycling specific qualifications are in addition to and must be complemented with walking expedition qualifications as detailed in Section 1.

Cycling expeditions may take place using public roads, towpaths and other non-technical terrain. Alternatively, the expedition may take place on marked trails in wilderness areas, and the leader's qualifications need to be matched to the terrain in which the expedition teams will be working. For simplicity this terrain has been split into two distinct categories, please note this does not directly relate to Bronze, Silver and Gold DofE Expeditions.

Table 4:

Description of Terrain	NGB Qualification
<p>1) Trail terrain: non-technical, that does not involve specific route selection; gentle to moderate rolling terrain, for example, rocks, roots or other obstacles in order to ride on it. It can be as narrow as handlebar width.</p> <p>Typical trail terrain includes: Canal paths and public highways, way-marked routes, rights-of-way on which cycles are permitted, identifiable routes, tracks and trails with obvious navigational features. These routes will be 90-95% rideable and take the group no more than 30 minutes walk by a reasonably fit person away from the nearest accessible road or a shelter with communication.</p>	<p>On Road: British Cycling Ride Leader Level 1</p> <p>Off Road: British Cycling Ride Leader Level 2 Off Road Non Technical Terrain</p> <p>CTC Trail MTB Leader Award</p> <p>COLA Level 1 Mountain Bike Trail Leader</p> <p>MBLA Trail Cycle Leader</p> <p>Cycling UK Trail Mountain Bike Leader</p> <p>MBCUK Trail Leader</p> <p>MIAS Level 1 and 2</p> <p>or</p> <ul style="list-style-type: none"> • Equivalent qualification • In house training with a statement of competence signed off by a technical adviser • Appropriate experience signed off by a technical adviser.
<p>2) Technical terrain: routes with obstacles, which require technical skill to be ridden over or avoided, such as roots, rocks or holes. It does not necessarily mean large drop offs or seemingly unachievable sections, but the sort of terrain that most mountain bikers may come across on a normal ride.</p> <p>Typical technical terrain includes: single-track, farm and moorland tracks and paths and other mountain bike accessible rights of way with sections requiring line selection to ride. Technical Terrain also includes trail terrain and public highways and roads.</p> <p>Areas of remoteness to any height above sea level and more than 30 minutes walk from the nearest shelter with communication that are easily exited in a few hours, returning to a refuge or an accessible road.</p> <p>(Areas that merge with mountain regions and do not have well defined boundaries are excluded)</p>	<p>British Cycling MTB Leader Level 2</p> <p>BSCA Mountain Bike / Off Road Leader</p> <p>Cola level 2 MBA</p> <p>CTC Technical Terrain Leader Award</p> <p>MIAS Level 2</p> <p>Cycling UK Technical Mountain Bike</p> <p>MBCUK Technical Trail Leader</p> <p>MBLA Mountain Bike Leader</p> <p>or</p> <ul style="list-style-type: none"> • Equivalent qualification • In house training with a statement of competence signed off by a technical adviser • Appropriate experience signed off by a technical adviser.

For overnight expeditions Leaders must also hold the relevant walking qualification for the level of terrain they are operating in. See Table 1

It must be noted that participants will be carrying all of their expedition equipment both on their bikes and on their person and good route selection and planning is essential, as bike handling will become more difficult with a loaded bike.

For all other considerations for cycling expeditions follow ALL the on foot expedition guidelines.

Section 3 – Paddlesport

The link below gives the qualification requirements for training and supervising young people for expeditions on water. These paddlesport specific qualifications are in addition to and must be complemented with walking expedition qualifications as detailed in Section 1.

Paddlesport expeditions may take place using canals, rivers and other inland waterways, lakes or at sea. These waters can be familiar to the participants but as participants improve the waterways are usually in rural areas and unfamiliar and more advanced expeditions could pass through wild country and moving water either current, tide or large bodies of water could be part of the challenge.

Leader's competence and qualifications need to be matched to the environment in which the expedition teams will be working.

Please visit:

<https://www.britishcanoeingawarding.org.uk/guidance-documents/>

British Canoeing Environmental Definitions & Deployment Guidance for Instructors, Coaches and Leaders

For all other considerations for paddlesport expeditions
follow ALL the on foot expedition guidelines.

For Advice and support – please refer to the Adviser at an early stage

D of E Expeditions – Horse

Rationale

The use of horse travel is encouraged, and will be used mainly in a road and bridleway environment. It allows a group to explore at greater distance and into new areas. There is some significant complexity to this activity that needs to be included in training young people. This includes horse competence on roads and tracks, group management, equine care and carrying expedition equipment. There are also expedition and camping issues that might not be covered in training courses.

Qualifications

At present (2021) there is no national award for leading, training and supervising expeditions. The Adviser for Outdoor Education will take advice from the British House Society to determine the training and qualification required.

Please ask the Adviser for Outdoor Education for advice when considering this activity to ensure that all aspects have been considered.

Environment	Qualifications	Group Size - Training	Group Size - Assessment	Other considerations
Road and Short tracks linking roads, usually all on minor roads Normal countryside	OE advice with BHS	This will vary according to route and environment, experience of the staff. Normally defined by the Awarding body.	This will vary according to route and environment, experience of the staff. Normally defined by the Awarding body.	First Aid Qualification is required and camping experience
Road and more extensive tracks, moving from one track to the next, demanding journeys and remoteness.	OE advice with BHS	As above	As above	First Aid Qualification is required and camping experience
Extensive use of off road and upland environments, remote settings and navigational challenges	OE advice with BHS	As Above	As Above	First Aid Qualification is required and camping experience