



Policy for the Management of Learning Outside the Classroom (LOtC) and Offsite Visits

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The Local Authority (LA), Hertfordshire County Council (HCC), acknowledges the immense value of off-site visits and related activities to young people, and fully supports and encourages those that are well planned and managed.

1. Provision of Employer Guidance

Hertfordshire County Council has formally adopted the Outdoor Education Advisers' Panel's (OEAP's) "National Guidance" as its own Employer Guidance and principle source of guidance and information regarding good practice for LOtC and Offsite Visits

It is a legal expectation that employees must work within the requirements their employer's guidance; therefore Hertfordshire Children's Services (CS) employees must the follow the requirements of this Policy Statement in conjunction with the Outdoor Education Advisers' Panel "National Guidance" (NG), This guidance can be found on the following web site:

<http://oeapng.info/>

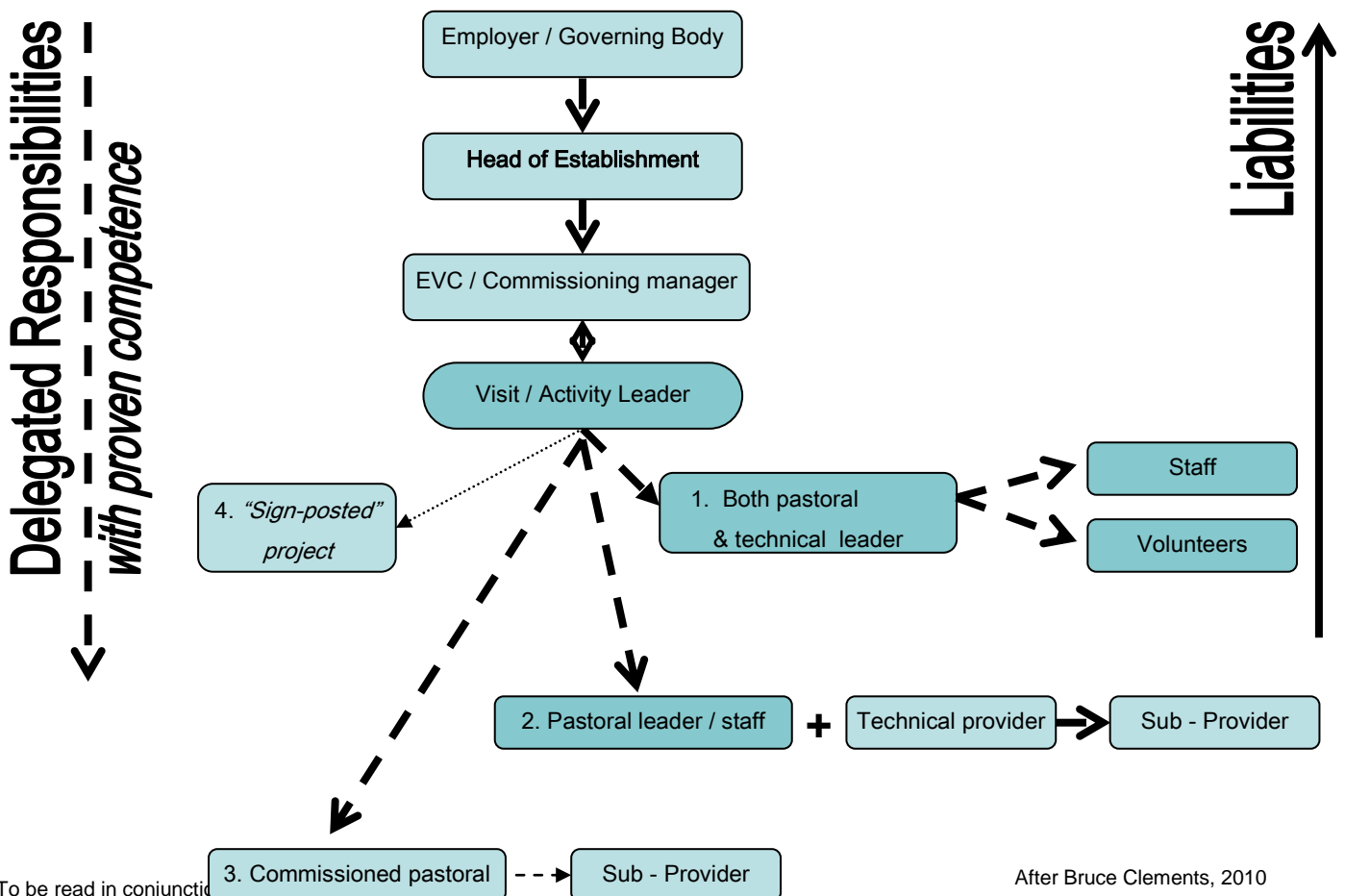
Where there is any variance of policy between the national guidance and local policy this Policy Statement sets out Hertfordshire's policy requirements which take precedence over any guidance.

Where another employer (such as the Governing Body of a Voluntary Aided, Foundation or Academy school) wishes to opt into Hertfordshire's guidance, systems and processes for supporting and monitoring LOtC activities, they should produce a policy statement of their own that makes this clear.

Where a Hertfordshire employee commissions LOtC activity, they must ensure that such commissioned agent has either:

1. adopted Hertfordshire or OEAP National Guidance
- or
2. has systems and procedures in place where the standards are not less than those required by OEAP National Guidance.

The flow chart below illustrates lines of responsibility and liability.



2. Scope and Remit

Document 1.1c “[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 NG document: 3.2a “[Underpinning Legal Framework](#)”

3. Ensuring Understanding of Basic Requirements

As an employer, Hertfordshire is required to ensure that its employees are provided with:

- appropriate guidance relating to visits and LOtC activity;
- 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.

Appropriate guidance for the management of Offsite Visits and LOtC in Hertfordshire can be found on the Employer Guidance pages at www.hertsdirect.org/lotcoffsitevisitsguidance from where there is a link to <http://oeapng.info/>

Hertfordshire uses the web-based system ‘EVOLVE’ to facilitate the efficient planning, management, approval, and evaluation of visits. All staff that lead or accompany visits can access their own EVOLVE account, which is set up by their establishment’s Educational Visits Coordinator (EVC). As well as being an efficient tool for planning and approving visits, EVOLVE also contains a variety of features including: search and report facilities, downloadable resources and information, staff records and visit history, gateway access for parents, etc.

EVOLVE: <http://offsitevisits.thegrid.org.uk>

Establishment Managers and Visits Coordinators

It is a requirement of Hertfordshire County Council that at least two senior members of staff from each CS establishment should attend a Management of Offsite Visits (EVC) Training course (e.g. head/manager and visits co-ordinator).

To help fulfil its health and safety obligations for offsite visits, each establishment must appoint an Offsite or Educational Visits Coordinator (EVC) who will support the Head of Establishment or approving manager. (In small establishments the EVC may also be the Headteacher or approving manager).

NB Where the Head of Establishment delegates the task of approval to another member of establishment staff this must be reflected in the establishments own local policy documentation.

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 leadership team of the establishment.

HCC recommends as good practice that the EVC should attend training and update training every 3 – 5 years

Where appropriate (see Section 1) the EVC should ensure that a policy is in place for educational and off-site visits, that this is updated as necessary, and is readily available to staff, e.g. via EVOLVE.

The EVC should support the establishment head/approving manager in ensuring that competent staff are assigned to lead and accompany visits (see Section 8) with approval and with other decisions.

Refer to NG document **3.4g** “[Responsibilities Headteacher/Managers](#)”

Refer to NG document: **3.4j** “[Responsibilities EVC](#)”

Visit / Activity Organisers/Leaders/Supervisors (see also section 8 below)

Those organising, leading or supervising visits or activities must be competent to do so. The manager or EVC must assess competence, taking account of their staff's ability to lead, manage and control the children or young people partaking in the visit. Competence on specific activities may also be necessary, as well as knowledge of the venue being visited.

The relevant training courses in Hertfordshire are:

1. Management of Offsite Visits (EVC) Training - all Hertfordshire Children's Services establishments are required to have a current, Hertfordshire-trained EVC in post. Training received from another OEAP-accredited trainer, out of County, may be acceptable at the discretion of Hertfordshire's nominated adviser.
2. Management of Offsite Visits (EVC) Update - in line with the above recommended good practice, all Hertfordshire Children's Services establishments should ensure that their EVC undertakes a formal revalidation every 3-5 years.
3. OEAP Visit Leader Training – this course is advised as being good practice for newly qualified Hertfordshire leaders or those with limited experience of leading offsite visits or LOtC activities. Currently there is no revalidation requirement. However, to meet National Guidance requirements regarding leader competence, leaders must be current in their knowledge of expectations of good practice. Recent use of EVOLVE, together with the listing of Awards & Training against their user's account on the system, may be regarded as appropriate evidence.

Adventurous Activities

The 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.

If the establishment is leading an adventurous activity, as defined in the Adventure Activities Licensing Regulations 1996 (climbing, caving, remote trekking, waterborne activities), and other activities that present hazards over and above those in everyday life, the manager must ensure that the group leader and other supervisors are suitably competent to lead or instruct the children or young people in the activity. Competences should be demonstrated by holding the relevant National Governing Body (NGB) award where it exists. Where there are queries regarding the competencies/experience required, the Offsite Visits Adviser or relevant NGB should be contacted for advice. Standards of competence to lead adventurous activities can be found in Appendix 1 (formerly *Part F, section 2* of the *Offsite Visits Manual*.)

Other Areas

Staff competence in first aid, minibus driving, life saving etc may also be needed, depending on the activity. Volunteers will also require induction training prior to a specific visit. Training requirements in these areas should be identified as part of the risk assessment process.

For the purposes of day-to-day updating of information, Hertfordshire EVCs and Visit / Activity Leaders are directed to the 'Home' and 'Resources' pages on 'EVOLVE' (which include information on how to access the relevant courses) available at <http://offsitevisits.thegrid.org.uk>
Information can also be found on the Offsite Visits pages on the Hertfordshire Grid for Learning <http://www.thegrid.org.uk/info/healthandsafety/visits/index.shtml>

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 Hertfordshire is:

Mark Falkingham,

Offsite Visits Adviser and Outdoor Education Team Manager (OVA)

E-mail evolvesupport@hertfordshire.gov.uk

4. Approval and Notification of Activities and Visits

Hertfordshire 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 National 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 the provision of an adventurous activity to be led by a member of establishment staff;
- involves field work to be led by a member of establishment staff in an area of "wild country"
- involves a journey abroad or a significant sea crossing (this includes visits to the Isle of Man, Northern Ireland, the Orkneys and the Shetland Islands)

Hertfordshire uses the on-line system for notification and approval, 'EVOLVE'. A key feature of this system is that visits and LOtC activities requiring notification are automatically brought to the attention of the Authority upon approval.

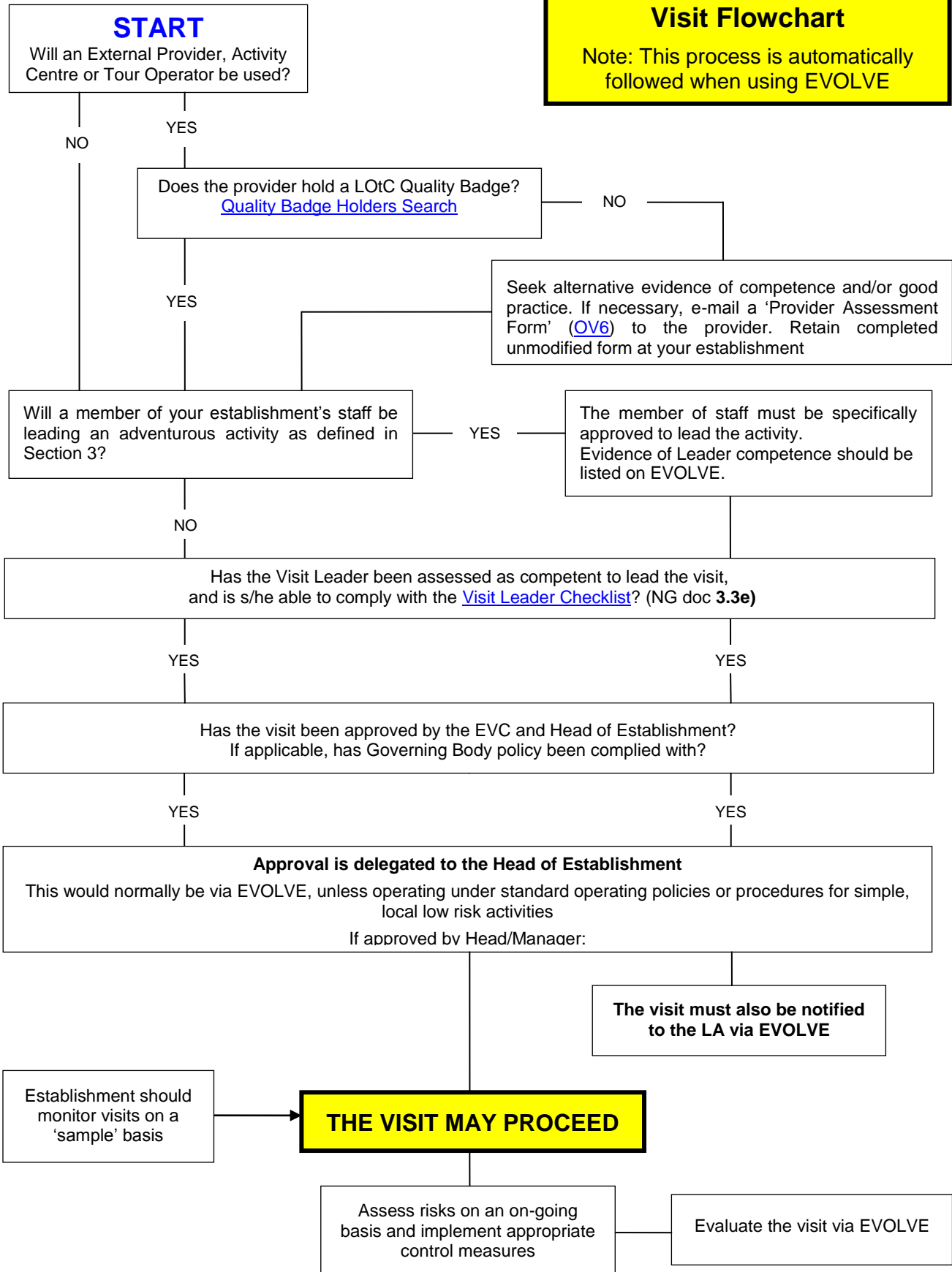
It is a requirement that all Hertfordshire children's services establishments should use the 'EVOLVE' system.

All notifiable visits should be submitted to the Authority at least 4 weeks before the departure date. This will give sufficient time for the Offsite Visits Advisor to review the visit and advise of any suggested amendments which may then be acted upon before the visit departs.

For further advice and help using the system, the establishment should contact

evolvesupport@hertfordshire.gov.uk

Visit Flowchart
 Note: This process is automatically followed when using EVOLVE



5. Risk Management

As an employer, Hertfordshire 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 Hertfordshire 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. Hertfordshire 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 Hertfordshire 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. Hertfordshire County Council ensures that establishments are supplied with an electronic portfolio of exemplar generic risk assessments. These risk management materials can also be accessed at http://www.thegrid.org.uk/info/healthandsafety/risk_assessment.shtml#offsite

Staff must review and adapt the generic risk assessments to ensure that they are appropriate for their specific events and in line with their practice.

Refer to NG document: **4.3c** “[*Risk Management*](#)”

6. Emergency Planning and Critical Incident Support

Staff involved in a visit must be aware of and adhere to their establishment’s policy on emergency procedures.

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, Hertfordshire is committed to providing emergency planning procedures to support establishments in the event of a critical incident.

Refer to NG document: **4.1i** “[*Emergencies and Critical Incidents – An Overview*](#)”

To activate support from Hertfordshire, the following telephone numbers should be used:

Monday – Friday 08.30-17.30, Saturday 09.00-16.00: **01438 737261**

All other times: **0800 547547**

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, Hertfordshire 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 National 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 NG document: **3.2b** [“Monitoring”](#)

See also **5.1c** [“Rigorous Evaluation of LOfC meeting Ofsted expectations”](#)

8. Assessment of Leader Competence (see also section 3 above)

National Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of Hertfordshire Policy that all Hertfordshire leaders and their assistants have been formally assessed as competent to undertake such responsibilities as they have been assigned in line with the guidance.

Refer to NG document: **3.2d** [“Assessment of Competence”](#)

9. Role-specific Requirements and Recommendations (see 3.4 of National Guidance)

National Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within Hertfordshire Children’s Services management structures. These are:

1. [Director of Children’s Services](#)
2. [Lead Member for Children’s Services](#)
3. [Line Manager of an Offsite Visits Adviser](#) (or equivalent post)
4. [Offsite Visits Adviser](#) (OVA) (known elsewhere as Outdoor Education Adviser)
5. [Adviser](#) (other than an OVA) including Health & Safety Officer, School Improvement Partner
6. [Manager of an Outdoor Centre or LOfC Facility](#)

Refer to NG [Section 3.4](#) ‘Roles and responsibilities’ for individual documents.

National 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/Managers](#)
3. [EVC](#)
4. [Visit or Activity Leader](#)
5. [Assistant Visit leader](#)
6. [Adult Helper](#)
7. [Parents and Guardians](#)
8. [Volunteers](#)

10. Charges for Off-site Activities and Visits

Hertfordshire 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 NG document: **3.2c** [“Charging for school activities”](#)

11. Disclosure & Barring Service (DBS) Checks

Hertfordshire employees who work [are working in Regulated Activity](#) either with young people or carrying out certain activities for adults, must undergo an enhanced [DBS](#) check as part of their recruitment process.

With specific reference to LOtC activities and Offsite Visits, HCC defines a Regulated Activity for Children is defined as any adult (staff or volunteer) carrying out **unsupervised** activities **at least once a week, 4 or more days, or once overnight** (between 2am and 6am) **in a 30 day period**

For the purposes of this guidance, “activities” are to: teach, train, instruct, care for or supervise children, provide advice/guidance on well-being, provide relevant personal care, e.g. washing or dressing, or drive a vehicle only for children. (The Regulations give a more detailed definition.)

Volunteers used on a temporary or occasional basis or supervised volunteers no longer fall within the scope of regulated activity and are not entitled to an enhanced DBS with barred list check, although HCC can still carry out an enhanced DBS *without* barred list check.

It must be clearly understood that a DBS check 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.

Hertfordshire’s recommendation to schools for trainee teachers on placement is that they only accept DBS’s obtained either:

- a) through the university or college for where the organisation has signed up to say that they will share our criteria to operate to certain minimum standards.
- b) from the person if they have registered with the Update Service and possess a relevant DBS check

Refer to NG document: **3.2g** “[Vetting and Disclosure and Barring Service 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”.

Hertfordshire requires establishments to ensure there is an appropriate level of supervision at all times for all visits and that such supervision is effective. This must have been approved by the EVC and Head of Establishment and, where applicable, in accordance with Governing Body policy.

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.

Staff assigned to support the special needs of particular individuals cannot be included in the overall staffing ratio. Their responsibility should not include the wider group.

Consideration should be given to the implications of one member of staff effectively being removed from the intended supervision arrangements for a period of time e.g. to accompany a pupil to hospital.

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. Any such arrangement must be made with specific agreement by the Head of Establishment beforehand, together with a risk assessment where appropriate.

Refer to NG documents: **4.3b** “[Ratios and Effective Supervision](#)”, **4.2a** “[Group management and Supervision](#)” and **4.3e** “[Safeguarding](#)”

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, which remove the need for use of Provider Assessment Forms (OV 6) and sight of Safety Management Systems documentation including risk assessments.

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).

Hertfordshire takes the view that where a provider holds any of the above accreditations, there should be no need to seek further assurances, unless there is specific and credible cause for concern.

Refer to: NG document **4.4h** "[Using external providers and facilities](#)"

14. Insurance for Off-site Activities and Visits

Employer's Liability Insurance is a statutory requirement and Hertfordshire 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. Hertfordshire 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 Hertfordshire employees in the course of their employment, providing predetermined benefits in the event of an accident. However, Visit / Activity Leaders are advised that they should consider taking out less limited personal accident cover privately, or obtain cover through a professional association.

Hertfordshire Visit and Activity leaders should contact the local authority's Insurance Department to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the insurer (01992 555480 or insurance@hertfordshire.gov.uk). They should also ensure they have obtained current information regarding any special policies that may be available to offer more comprehensive cover.

Refer to NG document: **4.4c** "[Insurance](#)"

15. 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.

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 Equality Act 2010, it is unlawful to:

- treat a young person to whom one of the protected characteristics applies less favourably;
- fail to take reasonable steps to ensure that such persons are not placed at a substantial disadvantage without justification.

Refer to NG document: **3.2e** "[Inclusion](#)"

See also docs **4.4i** "[Special Educational Needs and Disability](#)", **6e** "[Special Needs provision](#)"

Also see "[Hertfordshire Children in Need and Children Looked After Manual](#)"

16. Adventure Activities 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.

Leaders should also be aware that Local Authority-operated centres are not exempt from the regulations. Where Hertfordshire's outdoor centres are providers of "in scope" activities as defined by the regulations, they are licensed accordingly.

Refer to NG document: **3.2f** "[AALA Licensing](#)"

17. Good Practice Requirements

To be deemed competent, a Hertfordshire Visit / Activity Leader, or Assistant Leader must be able to demonstrate *the ability to operate to the current standards of recognised good practice for that role*.

All staff and helpers must be competent to carry out their defined roles and responsibilities.

National Guidance sets a clear standard to which Hertfordshire 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 original documents and certificates when verifying a 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 and it should be documented in the Risk Assessment.

Refer to NG document: **4.3a “[Good Practice Basics](#)”**

See also **4.3c “[Risk Management](#)”, 5.2b “[Planning Basics](#)”, 5.1c “[Rigorous Evaluation](#)”**

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 Hertfordshire’s 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.

Refer to NG document: **4.5a “[Transport: General Considerations](#)”**

Minibuses

It is a requirement of HCC Policy that all staff must hold category D1 entitlement on their driving licence in order to drive a minibus where HCC is the employer.

Whilst it is recommended that Academies and other non-maintained schools should also follow HCC’s policy, they should seek their own independent advice.

Hertfordshire’s recommendations for minibus drivers are:

- All drivers should take a break every 2 hours (or sooner if tired).
- The break should be a minimum of 15 minutes. Second and subsequent breaks may need to be longer to prevent fatigue.

- After 4½ hours of driving, the accumulated length of breaks from driving should be at least 45 minutes.
- If you do no other work than driving, your maximum working day should be 13 hours, of which you should spend no more than 9 hours driving.
- If you do any other work as well as driving, your maximum working day, taking account of other work undertaken before starting a journey, should be 10 hours, of which you should spend no more than 4 hours driving.

See HCC Minibus Policy and Manual

<http://www.hertsdirect.org/services/transtreets/rsu/driving/advice/minibus/>

Also see NG document: **4.5b** “[Transport in Minibuses](#)”

Transporting young people in private cars requires careful consideration. Where this occurs, there should be recorded procedures. HCC Form OV7D is available for this purpose.

Refer to NG document: **4.5c** “[Transport in Private Cars](#)”

19. Planning

Visit planning includes consideration of the question: ‘*What are the really important things that we need to do to keep us safe?*’ It should focus on those issues that are individual to the specific event, taking into account the needs of the group (including special and medical needs), the experience and competency of the staff team, and the leader in the context of the event. Significant issues must be recorded, either as notes or as an attachment on EVOLVE, and shared with all relevant parties.

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 meet 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 rigour (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.

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. (see NG **4.3d** “[Consent](#)”)

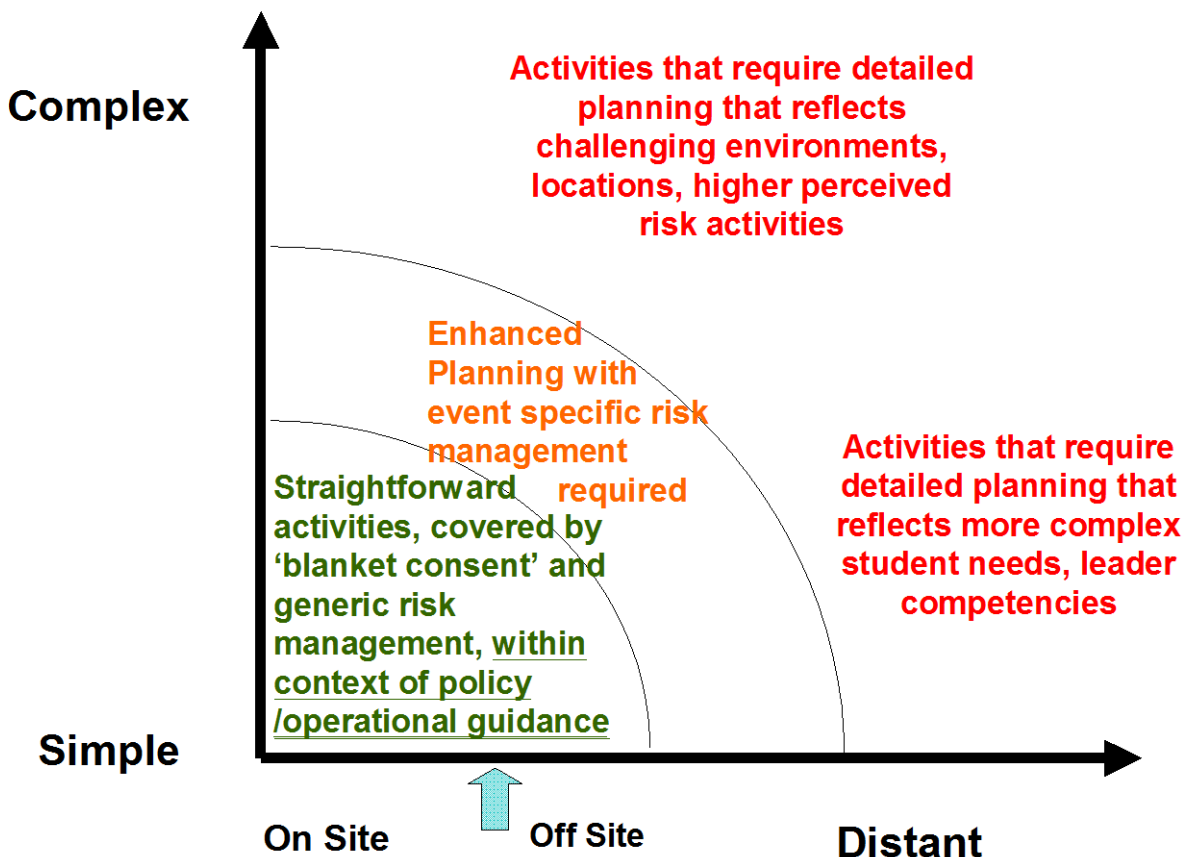
This supports the move towards developing activity-specific policies at establishment level for regular or routine activities. Such policies should be robust and equate to “operational guidance” that makes it clear how the activity should be planned and delivered, meeting all necessary recommendations 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 “**STAGED**” as explained below.

It is good practice to involve participants in the planning and organisation of visits, as in doing so they will make more informed decisions, and will become more ‘risk aware’ and hence at less risk. They will also have greater ownership of the event.

This practice is endorsed by HSE in [Principles of Sensible Risk Management](#)

- **S**taffing requirements – trained? experienced? competent? ratios?
- **T**iming – when? For how long?
- **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 NG document: [5.2b “Planning Basics for Outdoor Learning, Off Site Visits and Learning Outside the Classroom”](#)

20. Consent and Consent Forms

Whilst there is no legal requirement for schools to obtain parental consent for offsite activities that are curriculum-related and take place in normal school hours, it is courteous to inform parents/carers of any such event and provide the opportunity for them to withdraw their child from that event if they so wish.

For residential visits, those involving adventurous activities and for which a charge is made, specific consent should be sought. It is important that, as far as is reasonably practicable, sufficient detail is provided about intended arrangements as to allow *informed* consent to be given (i.e. based on sufficient and relevant information so as not to be able to subsequently claim “I didn’t know...”).

Hertfordshire provides an Event Specific Consent form (OV7a) and an Annual Consent form (OV7c) for routine and curriculum-related offsite activities which also be used to update any additional relevant information such as emergency contact details, food allergies, medical conditions and any additional support which the young person may require. There is also a Self-Consent form (OV7b) for use with adults and young people living independently.

The information contained on these forms should be regarded as sensitive and, as such, subject to Data Protection restrictions. For visits within the UK, whilst the establishment’s emergency contact must have access to that information, it is the decision of the local establishment as to whether the Visit Leader is required to carry copies of consent forms with them. Alternatively they can utilise the Participants Summary Information form (OV8) containing emergency contact numbers and essential details regarding specific needs, medical or dietary requirements etc. For visits outside the UK consideration must be given to the security of any consent forms taken and the information they contain.

Refer to NG document **4.3d** “[Consent](#)”

21. 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. Hertfordshire Heads, Managers, EVCs and Visit Leaders are strongly recommended to familiarise themselves with the main content of this report.

Refer to NG document: **2.4a** “[Ofsted 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 rigour* – i.e. in the way that classroom learning is evaluated – and a methodology to address this is provided within the National Guidance document:

5.1c “[Rigorous Evaluation of LOtC meeting Ofsted Expectations](#)”.