



**Bishop
Perowne**
Church of England College
Endeavour Forever

TRIPS, VISITS AND LEARNING OUTSIDE THE CLASSROOM POLICY

Date of last review:	02.11.21
Party responsible:	Callum Aitken (EVC)
Linked policies:	Charging; Transport; Critical Incident
Next review due:	02.11.22

The College Vision

We seek to develop a caring Christian community in which we nurture individuals; encourage learning, creativity and endeavour; inspire all to excel and reach their potential and to help all young learners grow into active and responsible citizens who are able to make a difference in the World.

1. Rationale

Bishop Perowne College recognises the significant role played by all types of learning in the development and education of young people. In particular, the importance and impact of trips, visits and learning outside the classroom (LOtC) cannot be underestimated. Trips and visits allow students to develop confidence, self-awareness and skills through a range of new experiences. They allow students to contextualise their learning and to grow through challenge to become more independent. Trips and visits increase students' motivation and willingness to learn and raise their aspirations.

This policy sets out to support and guide the successful planning, implementation, completion and evaluation of all such learning activities. Whilst the policy is inevitably substantial, it should be seen as a means to facilitate these learning opportunities rather than as a hindrance.

2. Aims

2.1. To develop learning outside the classroom as an entitlement for all students.

2.2. To ensure high-quality provision through learning outside the classroom experiences.

2.3. To encourage and support staff in delivering a wide range of progressive and frequent learning outside the classroom activities for all year groups and in all subjects.

2.4. To provide students with learning outside the classroom experiences which promote personal development and wellbeing.

2.5. To monitor and evaluate all learning outside the classroom activities in order to create an evidence base of their positive impacts.

3. Definitions

Learning Outside the Classroom (LOtC) is defined as any learning activity which takes place outside the usual learning environment. Routine PE lessons, although literally 'outside the classroom' are therefore not covered by this policy. However, *all* trips and visits which take students outside the College grounds, even if these are recurring or frequent visits such as sports fixtures, are covered by the requirements set out in this policy. In addition, there may be occasional activities within the College grounds (such as the hiring of a climbing wall for

example) which may need to meet these requirements. Any doubts as to whether a learning activity is classed as LOtC should be addressed to the Educational Visits Co-ordinator (EVC).

4. Provision of Employer Guidance

Bishop Perowne College has formally adopted “*OEAP National Guidance*” as “*Employer Visit Guidance*”. This guidance is endorsed by HSE, NAHT, NUT and a number of other professional associations and can be found on the following web site:

www.oeapng.info

It is a legal expectation that employees **must** work within the requirements of their employer’s guidance; therefore college employees must follow the requirements of “*OEAP National Guidance*”, as well as the requirements of this Policy Statement. College employees should also follow OEAP NG recommendations.

Where an employee of the college commissions an off-site activity, they must ensure that such commissioned agent or provider has either:

1. adopted Bishop Perowne or OEAP National Guidance
or
2. have systems and procedures in place where the standards are not less than those required by OEAP National Guidance.

5. Scope and Remit

The OEAP NG document 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.

6. Ensuring Understanding of Basic Requirements

Bishop Perowne College is required to ensure that its employees are provided with:

- appropriate guidance relating to visits and LOtC activities;
- 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 visits in Bishop Perowne College is the OEAP National Guidance website.

The relevant training courses are:

1. OEAP-accredited Educational Visit Coordinator (EVC) Training – Bishop Perowne College must have a current EVC in post.
2. Educational Visit Coordinator (EVC) Revalidation – Bishop Perowne College must ensure that the EVC undertakes a formal revalidation within the recommended period (usually 3-4 years).
3. MOVE (Management of Visit Emergency) training for designated emergency contacts. Bishop Perowne must have at least three trained emergency contacts in post.
4. OEAP-accredited Visit Leader Training – this course is a requirement of Bishop Perowne Visit Leaders and Deputy Visit Leaders. While there is no revalidation requirement, to meet OEAP NG guidance requirements regarding leader competence, leaders must be current in their knowledge of expectations of good practice. Updated refresher training on a 3-5 year basis is the HSE recommendation and is therefore strongly recommended.
5. Training for further Assistant Visit Leaders can be provided by the EVC 'in-house' at Bishop Perowne or at other local establishments at the discretion of the relevant headteacher also trained by B and S Educational Systems and Training Ltd.

For the purposes of accessing day-to-day advice or updating of information, Visit Leaders should consult the EVC – who has access to the appointed Technical Adviser. The nominated adviser for Bishop Perowne College is:

Bill Taylor, B and S Educational Systems and Training Ltd.

Telephone: 01239 654571

E-mail saltybill1@aol.com

7. 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.

Bishop Perowne College formally delegates the responsibility for formal approval of all visits and off-site activities to the EVC, in consultation with the Headteacher. It is a requirement of this policy that the EVC carries out this function in accordance with OEAP National Guidance. Formal notification of approval (or non-approval) should be sent to the visit leader.

The EVC will notify the appointed adviser of those visits and activities falling within any one of the triggers set out below:

- Activities which involve a residential or overnight stay;
- Activities which involve the provision of an adventurous activity;
- Activities where the EVC would like further guidance;

The above notification procedure requires the Visit Leader to submit the relevant information to the EVC. The EVC will then enter the relevant information on form F2 (appendix B) for submission to the appointed Adviser.

The EVC must also notify the governors of any activities falling within these triggers.

8. Risk Management

Bishop Perowne College has a legal duty to ensure that risks are managed - requiring them to be reduced to an “acceptable” 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 the college 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. Bishop Perowne staff should use 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 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. Bishop Perowne College has adopted a format for recording risk-benefit assessments based on that recommended in EVC Training. An electronic portfolio of exemplar generic risk-benefit assessments, as well as exemplar event-specific assessments using these materials is available to Visit Leaders.

It is the Visit Leader’s responsibility to ensure that any relevant information relating to individual staff or students is shared with all staff and any external providers.

9. Visit Emergency and Visit Critical Incident Support

Bishop Perowne College is committed to providing visit emergency support to Visit Leaders. An integral part of the risk-benefit assessment process is planning for possible emergencies. The OEAP national guidance identifies a hierarchy of visit problems:

- 1. Incident:** a situation dealt with by the Visit Leader, who remains in control and can cope.
- 2. Emergency:** an incident that overwhelms the coping strategies of the Visit Leader so that they refer to the Emergency Contact for help.
- 3. Critical Incident:** a situation that requires more resources and support than the Visit Leader and the school’s Visit Emergency Management team can readily provide.
- 4. Major Incident:** declared as such by the UK Police or Foreign and Commonwealth Office etc.

It is essential that visit leaders and assistant leaders are familiar with the College’s Critical Incident Protocol and the Visit Emergency Management Plan (see appendix). The Critical Incident Protocol is designed to provide visit leaders

with all necessary support in the case of any emergency situation. In particular, all visit leaders and assistant leaders must carry with them the relevant emergency contact telephone numbers throughout the duration of the visit. Visit leaders are obliged to inform the EVC (or other designated emergency contact) of any emergency or critical incident as soon as is practically possible. The visit leader must take all reasonable steps to ensure the safety and well-being of all participants in the trip, visit or LOtC activity, including immediately following a critical incident.

It is essential that the EVC and the other designated emergency contacts are provided with all details of each visit, including medical and next-of-kin information for all participants, both students and employees at least forty-eight hours before the start of the visit and ideally with one weeks' notice.

10. Monitoring and evaluation

Bishop Perowne College ensures that there is sample monitoring of visits and off-site activities. Such monitoring should be in keeping with the recommendations of OEAP National Guidance and is principally carried out through systems put in place by the EVC. The visit leader is responsible for monitoring that all plans are followed and that control measures identified within the risk-benefit assessment are put into action. The EVC is responsible for monitoring the completion of all necessary documentation by the visit leader, as well as the following of all procedures. The EVC will also check and offer advice on all risk-benefit assessments completed by visit leaders. Monitoring may also take the form of field observations by the EVC or other senior staff, or peer monitoring by assistant visit leaders. The work of the EVC should be monitored by the headteacher and board of governors.

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 off-site activities and visits, including the fact that it raises achievement.

Governors, Managers, EVCs and Visit Leaders are strongly recommended to familiarise themselves with the main content of this report. However, it also highlights the finding that *even where outdoor learning 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. It is an expectation of this policy that the organisation and learning outcomes of all visits and off-site activities are properly evaluated.

When any trip, visit or LOtC activity has been completed, the visit leader is required to complete a brief evaluation using the 'Trip evaluation' form (see appendix C). This provides evidence of reflective practice, informs the planning of future trips and, in many cases, will help to justify the provision of the same trip

on future occasions. Evaluation forms should be retained by the visit leader and a hard copy passed to the EVC for inclusion in the central record.

11. Assessment of Leader Competence

OEAP National Guidance provides specific advice regarding the assessment of leader competence. It is an expectation of this policy that all leaders and their assistants have been formally assessed as competent to undertake such responsibilities as they have been assigned.

12. Role-specific Requirements and Recommendations

OEAP National Guidance sets out detailed responsibilities and functions of specific roles that relate to roles to be found within school management structures. These are:

1. Member of Board of Governors
2. Headteacher
3. EVC
4. Visit or Activity Leader
5. Assistant Visit leader
6. Volunteer Adult Helper
7. Those in a position of Parental Authority

Any person holding one of these roles is expected to be familiar with the National Guidance. Refer to individual OEAP NG documents headed as above. Additional roles and responsibilities are detailed below:

Governors

Governors must be notified of any trips or visits which fall within either of the triggers set out below:

- Activities which involve a residential or overnight stay;
- Activities which involve the provision of an adventurous activity.

The governors must ensure that there is an EVC in place that meets with employer requirements. Succession planning should also be in place should the EVC change role or leave the College.

The Headteacher

The Headteacher formally delegates to the EVC the task of approval for all Learning outside of the Classroom (LOtC) activities as defined in section three of

this policy. The Headteacher should be available to the EVC for consultation regarding any trips or visits which fall within the triggers set out above, or any which have a significant impact on students' or staff's curriculum time. The Headteacher must be notified of all trips and visits, which fall within these triggers.

The EVC

The EVC must have attended an EVC training course and any necessary refresher courses. The EVC must be someone who has the experience of practical visit leadership over many years. Such a person should be an experienced visit leader with sufficient status within the establishment to guide the working practice of colleagues leading visits.

The EVC is responsible for assessing the competence of all Visit Leaders and ensuring that only those with an appropriate level of competence are allowed to lead visits.

The EVC has responsibility for formal approval of all visits and off-site activities. Formal notification of approval (or non-approval) should be sent to the Visit Leader.

The EVC's role is to advise and support all employees leading LOtC activities. As such, the EVC must be actively involved in all stages of the planning process as laid out in the 'Trip guidance flow chart' document (see appendix F). The EVC must keep a central record of hard copies of all planning and evaluation documentation for all LOtC activities. The EVC is responsible for keeping up to date with any changes to National Guidance, reviewing and updating the Trips, Visits and LOtC Policy as required.

The Visit Leader

Any employee wishing to lead a visit must have attended a Visit Leader training course. Visit Leaders must be accountable and competent (as defined in the National Guidance). They must liaise closely with the EVC, ensuring that all stages of the 'Trip guidance flow chart' document (see appendix F) are completed and that the procedural requirements laid out in this policy are followed. The Visit Leader must ensure that hard copies of all necessary documentation are provided to the EVC for inclusion in the central record. This documentation should include an evaluation of each LOtC activity as detailed in this policy.

Deputy Visit Leader

All trips and visits are required to have a designated Deputy Visit Leader. This must be someone who has completed Visit Leader training and who is willing and able to assume the role of Visit Leader during the trip or visit should any circumstances necessitate this.

Assistant Visit Leaders

Where more than two staff are required for a trip or visit, the remaining staff are known as Assistant Visit Leaders. They do not need to have completed externally accredited Visit Leader training but do need to complete 'in-house' training with the EVC.

Emergency contacts

For each trip or visit, a minimum of three emergency contacts must be identified and recorded in the trip paperwork. These contacts must have completed MOVE (Management of Visit Emergency) training and must not be participating in the trip or visit. They must be contactable by phone throughout the duration of the trip or visit and all Visit Leaders, Deputy and Assistant Visit Leaders must be provided with their contact details. The role of the emergency contacts is to provide advice and put into place support in the event of an emergency during a trip or visit, in accordance with the Visit Emergency Management Plan (see appendix).

13. Charges for Off-site Activities and Visits

Employees with visit responsibilities 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. The College Charging Policy is available on the Bishop Perowne website. When calculating the costs of a trip or visit, the following information must be taken into account:

- The College is not permitted (by law) to charge for any trip or activity which falls mostly within College hours.
- 'Mostly' is defined as 50% or more of the duration of the trip.
- However, each week day counts as two school sessions – morning and afternoon. (**Example 1:** *Students are away from noon on Wednesday to 9pm on Sunday. This counts as 9 half days including 5 school sessions, so the visit is deemed to have taken place during school hours.* **Example 2** *Pupils are away from school from noon on Thursday until 9pm on Sunday. This counts as 7 half days including 3 school sessions, so the visit is deemed to have taken place outside school hours.*)
- Charges can be made for the cost of board and lodging for residential visits.
- No letter to parents/carers can ask for payment for any trip or visit which falls mostly within College hours. Instead, letters must invite parents/carers to make a voluntary contribution and must make it clear that if insufficient voluntary contributions are received, the trip or visit will not be able to take place.

- In calculating the amount of voluntary contribution to be requested for a trip or visit, all associated costs must be covered. This includes:
 - The cost of cover at £50.00 per member of staff per day.
 - A fixed charge of £50.00 for use of a College minibus outside the immediate local area. (See College Transport Policy.)

14. Vetting and DBS Checks

Employees who work *frequently* or *intensively* with, or have *regular access to* young people or vulnerable adults, must undergo a 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 four 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.

15. Requirement to Ensure Effective Supervision

Employees with a visit leadership role must meet legal and good practice requirements with regard to 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.

Staffing must be agreed with and approved by the EVC. Guidance on appropriate staffing levels can be sought from the EVC. It is not normally expected that volunteers who are not employees of the College will be used to staff LOtC activities. If volunteers are to be used, the express permission of the Headteacher must be sought and all appropriate vetting procedures must be followed.

It is the Visit Leader's responsibility to ensure the effective supervision of students throughout a trip or visit. This includes ensuring that a member of staff remains with students on return to Bishop Perowne until the last student has returned to the care of their parents/carers.

16. 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.

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
- Adventure mark
- NGB centre approval schemes (applicable where the only provision is a single, specialist activity).

Bishop Perowne College takes the view that where a provider holds one of the above accreditations, there should be no need to seek further assurances.

17. Insurance for Off-site Activities and Visits

Employer's Liability Insurance is a statutory requirement and Bishop Perowne 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. The

college 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. College 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 off-site activities and visits organised by both college employees and volunteer helpers.

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

18. Behaviour

Students and employees are expected to maintain and uphold the same high standards of behaviour during LOtC activities as they are required to display within College, as agreed and set out in the College Codes of Conduct. Students' misbehaviour during a LOtC activity should be dealt with on return to College using the usual sanctions. In addition, visit leaders must consider what sanctions can be imposed whilst the trip proceeds.

For residential visits, students and their parents/carers should sign up to an agreed behavioural contract. This should include parental acceptance of a responsibility to remove a student from the visit should the student's behaviour place them beyond the reasonable care and control of the College staff.

19. 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.

Visit Leaders 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

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 disabled young person less favourably;
- fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage without justification.

EVCs and Visit Leaders must seek to ensure that a representative proportion of disadvantaged students are included in each trip or visit.

20. Adventure Activities Licensing Regulations

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 AALA license is an assurance of safety. It does not accredit educational or activity quality.

21. Good Practice Requirements

To be deemed competent, a Visit 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.

OEAP National Guidance sets a clear standard to which Bishop Perowne leaders *must* work.

OEAP 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.*
- *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.

Where a Volunteer Helper is a parent (or otherwise in a close relationship to 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.

The Visit Leader is responsible for ensuring that hard copies of all details of each trip or visit are passed to the EVC at least forty-eight hours before the start of the trip or visit and ideally with one week's notice. The details required are set out in the trips and visits checklist. In particular, all contact details of staff and students participating, together with destinations, transport arrangements and planned timings are essential. Copies of these details will be kept centrally in reception during a trip or visit so that any queries from staff or parents can be addressed.

22. Parent/carer engagement and consent

It is expected that parents/carers will always be informed if their son/daughter is going to be offsite for any reason. For one-off trips and visits, parents/carers must

be given full details of the arrangements and activities involved and individual parent/carer consent must be sought for each student participating. This can be written or verbal via a telephone call, but records must be kept. Students must not be taken offsite without such consent.

For local or regular trips and visits (such as PE fixtures), blanket consent will be sought from parents/carers at the start of each academic year. This will be organised by the College administration team, who will hold a central record accessible to all Visit Leaders. It is the Visit Leader's responsibility to cross-reference this record with the proposed student participants. Any student who does not have blanket parent/carer consent on record will not be able to participate in any offsite activity unless specific consent for that activity is sought and received.

23. 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 Bishop Perowne College'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.

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

24. 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.

At a very early stage of the planning process, the provisional staffing team should carry out a planning 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.

- **Staffing requirements** – trained? experienced? competent? ratios?
- **Activity characteristics** – specialist? insurance issues? licensable?

- **Group characteristics** – prior experience? ability? behaviour? special and medical needs?
- **Environmental conditions** – like last time? impact of weather? water levels?
- **Distance from support mechanisms in place at the home base** – transport? residential?

