

# **Warrington Borough Council**

## **Guidance for Learning Outside the Classroom including the use of EVOLVE**

**September 2022**

	Page	Section
Overview	3	1
Scope and Remit	3	2
Role-Specific Requirements and Recommendations	4	3
Basic Requirements	4	4
Role of the Educational Visits Co-ordinator	5	5
Approval and Notification of Visits and LOTC Activities	5	6
Assessment of Leader Competence	8	7
Parent/Carer Consent	8	8
Risk Management	9	9
Overseas Visits	9	10
Emergency Planning and Critical Incidents	10	11
Requirement to endure Effective Supervision	11	12
Vetting and Disclosure and Barring Service	11	13
Using an External Provider and Preliminary Visits	12	14
Inclusion	13	15
Insurance	13	16
Transport	13	17
Monitoring	15	18
Review and Evaluation	15	19
Example Emergency Card Visit Leader	16	
Example Emergency Card Home Contact	18	
Contacts	20	

## **1 Overview**

Warrington Borough Council acknowledges the immense value of learning outside the classroom and related activities for our children and young people. We fully support and encourage visits that are well planned and managed.

Warrington Borough Council has formally adopted “OEAP National Guidance” as “Warrington Borough Council Employer Guidance”. This guidance can be found at [www.oeapng.info](http://www.oeapng.info) .

It is a legal expectation that employees should work within the requirements of their employer guidance; therefore Warrington Borough Council employees and those establishments who have purchased a service level agreement for this service should follow the requirements of “OEAP National Guidance”, as well as the requirements of this Policy Statement.

## **2 Scope and Remit**

Please refer to the OEAP National Guidance [1c-Status-Remit-and-Rationale-1.pdf](#)

This document clarifies the range of employees whose work requires them to use this guidance. In brief, it applies to those whose work involved the following:

- Direct supervision of children and young people undertaking experiences beyond the boundaries of their normal base;
- Direct supervision of children and young people undertaking experiences that fall under the remit of learning outside the classroom;
- Facilitating experiences for children and young people beyond the boundary of their normal base;
- Deploying staff who will supervise or facilitate experiences for children and young people beyond their normal base;

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

We recommend that employees read the detailed legal expectations which can be found on the OEAP National Guidance document [3.2a-Underpinning-legal-framework.pdf \(oeapng.info\)](#) .

### **3 Role-specific Requirement and Recommendations**

OEAP National Guidance sets out clear guidance with regards to the functions of specific roles that relate to those roles typically found in our establishments. These are:

- Member of Board of Governors or Management Board
- Head teacher
- Manager of an establishment other than a school
- EVC
- Visit or Activity Leader
- Assistant Leader
- Volunteer Adult Helper
- Those in a position of Parental Authority

Please refer to OEAP National Guidance documents headed as above.

### **4 Basic Requirements**

As an employer, Warrington Borough Council is required to ensure that its employees are provided with:

- Appropriate guidance relating to educational visits and learning outside the classroom activities
- Access to advice, support and training from officers with a proven expertise and a professional understanding of the OEAP National Guidance, OEAP accredited training and expectations set by current good practice.
- Suitable systems and processes to ensure that those who are trained are kept updated.

Warrington Borough Council requires all Community, Voluntary Controlled schools, those who have formed a service level agreement to this service and other children's services establishments to:

- Have a policy for Learning Outside the Classroom that follows OEAP National Guidance.
- OEAP accredited Educational Visits Coordinator (EVC). All establishments are required to have a current, trained ECV in post.
- OEAP accreditation is valid for 3 years. Establishments should ensure that revalidation training is undertaken

## **5 Role of the Educational Visits Coordinator (EVC)**

To fulfil health and safety obligations for educational visits and learning outside the classroom activities, establishments must appoint an Educational Visits Coordinator who will support the Head of the establishment (in small establishments the EVC may also be the Head or Business Manager).

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 within the senior management of the establishment.

Further information with regards to the role of the EVC can be found on the OEAP National Guidance document [3.4j-EVC.pdf](#).

A useful checklist for EVC's can be found on the OEAP National Guidance document [Search Results | \(oeapng.info\)](#).

## **6 Approval and Notification of Visits and Learning Outside the Classroom Activities**

OEAP National Guidance categorises visits as Standard and Enhanced – explanations of these categories can be found on the OEAP National Guidance document [4.3c-Risk-Management-an-Overview-1.pdf](#).

Standard visits are further classified as the following:

### **Category A Visits**

Category A visits are those visits which are close to school and completed on a regular basis. The environment would be known to staff and the visit would include normal daily life activities.

Examples of a category A visit would be exploring the local area to the establishment, walks, visits to the local church, sporting fixtures and local walks. It can also include transport if needed.

### **Category B Visits**

Category B visits are to areas beyond the local area involving more complex environments and activities. They are typically one off or irregular activities.

Examples of a category B visit would be visits further afield such as swimming lessons (off site), farm visits, theme parks, museums, sporting festivals and basic outdoor education activities.

### **Category C Visits (enhanced visits)**

Category C visits include, residential visits, adventurous activities and overseas visits.

It is not possible to provide a definitive list of activities. Examples of category C visits would include Duke of Edinburgh expeditions, outdoor adventurous activities including open water activities, hill walking, field studies including water etc.

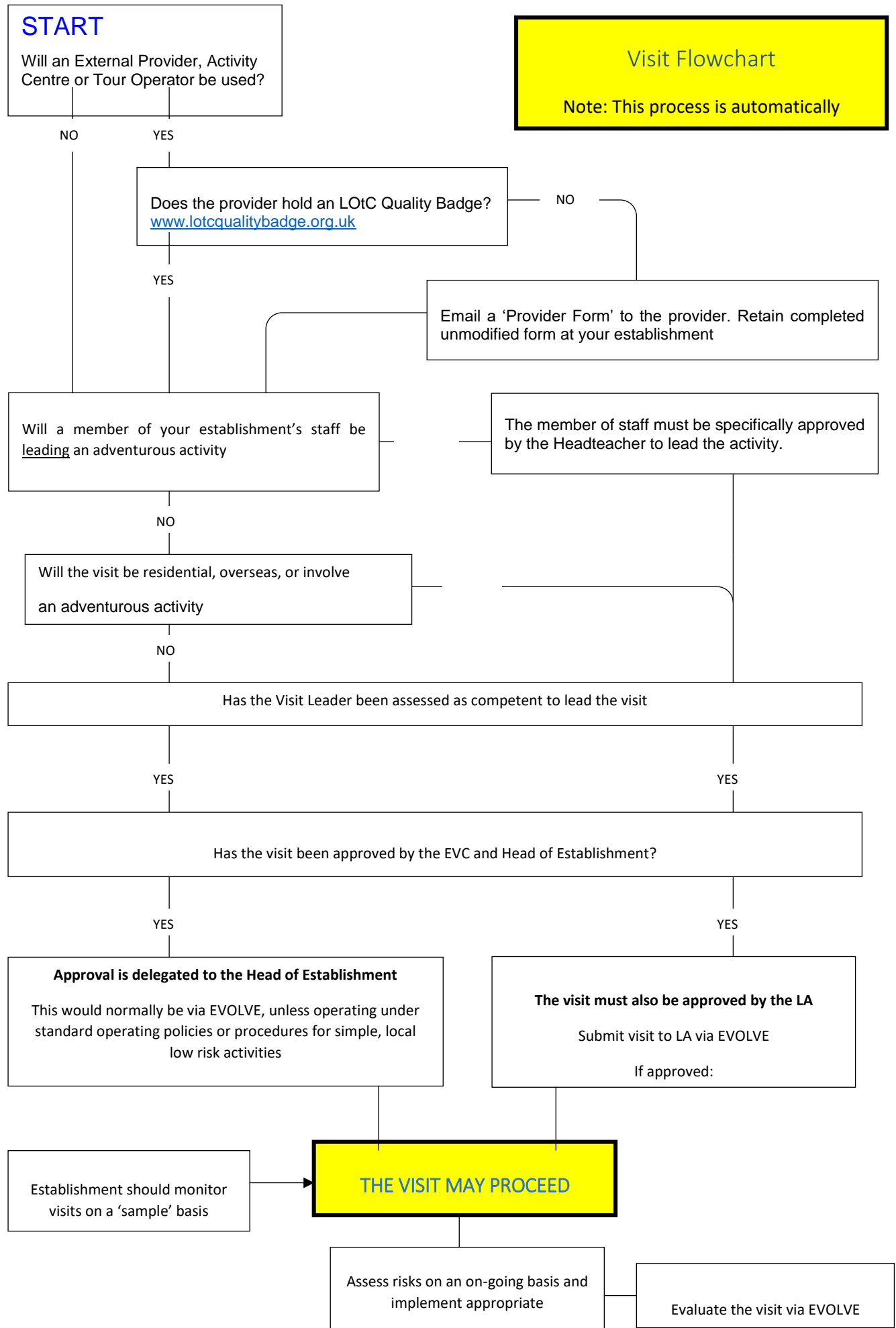
The OEAP National Guidance document [7.1a-Adventure-activities.pdf](#) further explains the definition of adventure activities.

Warrington Borough Council delegates responsibility for formal approval of category A and B visits to the Head of establishment. It is a requirement of this policy that Heads/Managers carry out this function in accordance with OEAP National Guidance.

Category C visits should be approved by an approved Warrington Borough Council Officer who is a member of the Outdoor Education Advisors Panel (OEAP).

Warrington Borough Council uses the web-based system 'EVOLVE' to facilitate the effective planning, management, approval and evaluation of educational visits and learning outside the classroom activities. All staff that lead or accompany visits/activities can access their own EVOLVE account, which is set up by their establishments EVC. EVOLVE can be accessed via [www.warringtonvisits.org.uk](http://www.warringtonvisits.org.uk)

All category C visits must be entered onto the EVOLVE system to ensure that LA approval is gained before the visit takes place. All category C visits must be submitted to the LA **at least 30 days prior to the visit taking place.**



## **7 Assessment of Leader Competence**

In approving visits the Head of establishment and EVC should ensure that the visit leader has been appropriately inducted/trained, and has the competence to lead the visit.

OEAP National Guidance provides clear advice around the assessment of leader competence. It is an expectation of Warrington Borough Council that all Visit Leaders and their assistants in community, voluntary controlled schools and those who have entered into an SLA for the service will have been assessed as competent to undertake such responsibility.

Please refer to OEAP National Guidance document [3.2d-Approval-of-Leaders.pdf](#) .

## **8 Parent / Carer Consent**

Parental consent is needed for all off-site visits and activities organised by nursery schools.

All establishments should obtain consent for any activity which is perceived to involve a higher level of risk, such as a visit involving a long journey or adventure activity. Otherwise, establishments that children attend as part of their day-to-day education or training need obtain consent only for visits taking place outside the establishment's normal hours.

Consent is not required for children to participate in off-site activities (such as local studies and visits to a museum or library) that take place during the establishment's normal hours and which are a part of its secular curriculum (Education Act 2002 section 29). While parents do not have the option to withdraw their child from the curriculum, except for religious or sex education, it is good practice to inform them that a visit or activity is to take place. Asking for consent when it is not needed can lead to some parents assuming they can withhold consent and so withdraw their child from a curriculum visit when this is not the case.

In addition to gaining consent for participation in certain visits, it may be necessary to ask parents for other consent, such as:

- Consent for children to receive emergency medical treatment, including administration of an anaesthetic or blood transfusion, in the event of an emergency when parents cannot be contacted;
- Consent for the establishment to share personal data such as contact details, medical and behavioural information with third-party providers (under the terms of the establishment's privacy policy);
- Consent for the use of photographs of children by the establishment or by any provider;
- Agreement to any financial or other terms and condition



Please refer to OEAP National Guidance document [4.3d-Parental-Consent-1.pdf](#)  
Within this guidance you will find detailed information including types of consent and informing parents.

## 9 Risk Management

As an employer, Warrington Borough Council has a legal duty to ensure that risks are managed by requiring them to be reduced to an “acceptable” or “tolerable” level as the elimination or risk may not be practicable. Risk management is an essential component to EVC training.

The risk management of an activity should be informed by the benefits to be gained from participating. Warrington Borough Council strongly recommends a “risk-benefit assessment” approach, whereby the starting point for the 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 risk so that they are able to learn how to manage risk for themselves.

There is no legal or Warrington Borough Council requirement to produce a risk assessment in a particular format; but there is a legal requirement for the process to be recorded and for suitable and sufficient control measures to be identified for significant risk i.e. those that may cause serious harm, or harm several people.

Please refer to OEAP National Guidance document [4.3c-Risk-Management-an-Overview-1.pdf](#).

## 10 Overseas Visits

We acknowledge the immense educational benefits that overseas visits can potentially bring to young people, and fully supports and encourages overseas visits that are correctly planned, managed, and conducted.

In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

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

**Culture:** food and drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information, alcohol & drugs.

**Accommodation:** checked for suitability, security, safety precautions and emergency evacuation.

**Transport** systems have been assessed as safe for use.

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

Please refer to OEAP National Guidance document [7.1r-Overseas-Visits.pdf](#) this document is regularly updated and contains up to date information on such changes due to Covid and Brexit.

Visit leaders for overseas visits will also find the OEAP National Guidance document helpful [3.3g-Checklist-Visit-Leader-Overseas-Visit.pdf](#)

For exchange and homestays please refer to the OEAP National Guidance document [7.1f-Exchanges-and-Homestays.pdf](#)

## **11 Emergency Planning and Critical Incident Support**

A critical incident is an incident where any member of a group taking part in an off-site visit/activity has:

- Either suffered a life threatening injury or fatality
- Is at serious risk
- Has gone missing for a significant and unacceptable period

For all visits all staff should be have knowledge of and adhere to their establishments critical incident procedure.

For visits that take place outside normal establishment working hours we recommend:

- A completed Emergency Card – Visit Leader (or equivalent) must be with the visits leaders (and deputy leader) at all times, **and**
- A completed Emergency Card - Home Contacts (or equivalent) must be with the emergency home contact(s) at all times, where access to Evolve is not possible  
(Example emergency cards can be found at the back of this document)

In an emergency, if it is not possible to reach any of the designated establishment emergency contacts, the visit leader should call Warrington Borough Council 24 hour emergency number 01925 444400.

Please refer to OEAP National Guidance document [4.1b-Emergencies-and-Critical-Incidents-Overview-1.pdf](#) .

## **12 Requirement to Ensure Effective Supervision**

All visits must have 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”.

For all visits the Visit Leader, EVC and Head of establishment must make a professional judgement regarding the number and suitability of staffing on an individual basis after considering the following factors:

- The nature and duration of the visit and the planned activities;
- The location and the environment in which the activity is taking place;
- The nature of the group, including the number of children/young people and their age, level of development, gender, ability and needs (behavioural, medical, emotional and educational);
- Staff competence;
- The consequence of a member of staff being indisposed, particularly where they will be the sole leader with a group for any significant time.

However, as an exception to the above, DFE prescribes ratios for early years – this can be found in the statutory framework for the early years foundation stage.

Please refer to OEAP National Guidance document [4.3b-Ratios-and-Effective-Supervision \(1\).pdf](#)

And

OEAP National Guidance document [4.2a-Group-management-and-supervision-1.pdf](#)

## **13 Vetting and Disclosure and Barring Service (DBS) Checks**

Employees who work frequently or intensely with, or have regular access to children/young people or vulnerable adults, must undergo an enhanced DBS check as part of their recruitment process.

For the purpose of this guidance:

- Frequently is defined as “once a week or more”
- Intensively is defined as 4 days or more in a month or overnight

It must be clearly understood that a DBS check (or other vetting procedure) in itself, is no guarantee.

The placement of an adult within a situation of professional trust (where children/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.

Please refer to OEAP National Guidance document [3.2g-Vetting-and-DBS-Checks.pdf](#)

## **14 Using an External Provider and Preliminary Visits**

The decision to use an external provider is the responsibility of the Visit Leader, EVC and Head of establishment. Warrington Borough Council does not 'approve' external providers or tour operators.

It is good practice for Visit leaders to take full advantage of nationally accredited, provider assurance schemes that are available, thus reducing bureaucracy. Examples of such schemes include:

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

Warrington Borough Council recognises that the Learning Outside the Classroom Quality badge is an assurance that providers have successfully completed a robust vetting process.

To confirm that all aspects of the operation of the provider are satisfactory, the establishment must ensure that either:

- The provider holds a LOtC Quality Badge
- Or
- A 'Provider Form' has been satisfactorily completed by the provider  
Note: if a provider holds any other accreditation but not an LOtC Quality Badge a provider form is still required

All visits should be thoroughly researched to establish the suitability researched to establish the suitability of the venue and to check that facilities and third party provision will meet the expectations of the group. Such information gathering is essential in assessing the requirements for effective supervision of children and 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 where a preliminary visit is a requirement.

Please refer to the LOTC Quality Badge website [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

Please refer to OEAP National Guidance document [4.4g-Selecting-External-Providers-and-Facilities.pdf](#) - within this document you will find the provider form/statement.

## **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 needs, ethnic origin, gender, religion or sexual orientation. If a visit needs to cater for children / young people with special needs, every reasonable effort should be made to find a venue that is both suitable and accessible and enables the whole group to participate fully and be actively involved.

Under the Equality Act 2010 it is unlawful to:

- Treat a disabled child / young person less favourably
- Fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage without justification

Establishments should take all reasonably practicable measures to include all children/young people. The principles of inclusion should be promoted and addressed for all visits and reflected in the establishment policy.

Please refer to OEAP National Guidance document [3.2e-Inclusion.pdf](#) .

## **16 Insurance**

Establishments organising off-site visits away from their local area should have travel insurance which covers the planned activities.

This type of policy will normally cover personal accident; cancellation and curtailment; personal liability; personal effects and money; medical expenses and repatriation. It may be available as part of, or as a supplement to, broader insurance policies such as those negotiated by employers.

You should check that insurance covers staff (including any volunteers) as well as participants.

You should ensure that the cover is not invalidated by circumstances that are possible when travelling with young people. For example, what would happen if a

participant had to receive medical care or be repatriated due to self-harm, mental illness or undeclared pregnancy?

Where the available cover is inadequate, you should consider taking out additional insurance, or extensions to the policy.

For those establishments who have purchased the Warrington Borough Council SLA to cover insurance full information about the cover, claims forms etc. can be found on My School Services.

Please refer to OEAP National Guidance document [4.4c-Insurance.pdf](#) .

## **17 Transport**

The planning of transport to support off-site activities and visits must be given careful thought. Evidence demonstrates that it is much more dangerous to travel to an activity than to engage in it. All national and local specialist regularity requirements must be followed.

Every visit must have a travel risk assessment no matter what mode of transport to be used.

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 mini bus.

The visit leader should ensure that coaches and buses are hired from a reputable company.

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

Please refer to OEAP National Guidance documents:

[4.5a-Transport-general-considerations-2.pdf](#)

[4.5b-Transport-Minibuses.pdf](#)

[Search Results | \(oeapng.info\)](#)

[4.5c-Transport-in-private-cars.pdf](#)

## **18 Monitoring**

Monitoring of the health and safety of visits and activities should be done in such a way that it is a positive experience of leaders, with supportive feedback to enable them to reflect upon and improve their practice. It can be integrated with appraisal and with observation of teaching and learning – in this case outside the classroom.

Please refer to OEAP National Guidance document [3.2b-Monitoring.pdf](#) .

## **19 Review and Evaluation**

It is good practice for an establishment to review its provision regularly. For example, after a programme of activities, a major visit such as a residential, or a new type of activity or visit, the Educational Visits Coordinator (EVC) might facilitate a review including the visit leader and other staff. The establishment should also encourage leaders to review the experiences that they lead, and should have a system which ensures that any incidents, concerns, and lessons learned by leaders are communicated to the EVC, and incorporated as necessary into establishment policies, procedures, and training. Reviews by establishments can form an integral part of the evaluation of experiences, and of the monitoring of provision for continual improvement.

Evaluation of individual visits should be completed on Evolve.

Please refer to OEAP National Guidance document [4.2c-Reviewing-1.pdf](#) and [5.1d-Evaluation.pdf](#) .

# Emergency Card (Visit Leader)

**This 'card' must remain with the Visit Leader at all times on a visit**

**In the event of a significant incident or accident that does not involve serious injury or fatality, and/or is not likely to attract media attention**, the Visit Leader should seek advice from their establishment emergency contact(s). This should normally include a member Senior Management of the establishment

**In the event of an incident that does involve serious injury or fatality, and/or is likely to attract media attention**, the Visit Leader should adopt the following protocol:

1. Assess the situation;
2. Safeguard uninjured Attend members of the group (including self);
3. Attend to any casualties;
4. Call emergency services, if appropriate.  
(999 or appropriate local number if abroad, Europe 112, North America 911)

**Contact the LA Emergency Contact Number** and request the help of the Emergency Response Team.

## **Warrington Borough Council Emergency Contact**

**Tel: 01925 444400**

Ask for the Emergency Response Team

Be prepared to give:

- Your name and Establishment/Group
- Phone number & back up phone numbers
- Exact Location
- Nature of Incident
- Number in the Group

You will be called back within 30 minutes so try not to make outgoing calls until contact is made. You will be given advice and asked what the LA can do to support you.

Then:

- Contact your establishment, EVC or Home Contact (see below) and seek further advice. If you are unable to do this, the LA will contact your establishment on your behalf.
- If practicable, delegate party leadership to the Deputy Leader, in order that you can be contactable at all times, and to enable you to coordinate all necessary actions;
- You will be provided with a dedicated number to refer all press, media, parental, or other enquiries to the LA and for continuing contact with the LA during the incident.
- Wherever possible, prevent group members from using telephones or mobiles, or going on-line until such time as this has been agreed by the LA;
- Do not allow any member of the group to discuss liability with any other party.



When the incident is under control:

- Seek further and full details of the incident, how and why it happened so far as can be established at this stage;
- Maintain a detailed written log of all actions taken and conversations held, together with a timescale – It may be appropriate to ask someone else to do this;
- Contact the British Consulate / Embassy if abroad.

Name	Home	Mobile
Establishment		
WBC Emergency Call Centre (for <b>initial</b> contact during an emergency only)	<b>01925 444400</b>	-

Establishment 'Home' Contact		
Head of Establishment / Chair of Governing Body (optional)		
Other/EVC		

NOTES:

# Emergency Card (Home Contacts)

For visits that take place outside normal establishment hours.

**This 'card' or equivalent must remain with the establishment emergency contact(s) at all times, if access to EVOLVE is not possible.**

**The establishment's Emergency Home Contact(s) should have all visit information, including itinerary, venue details, names, medical information and emergency contact details for all participants including staff.**

In the event of being contacted by the Visit Leader (or other member of staff involved in a visit), you should:

- Confirm the phone number at which the caller can be contacted back on;
- Note their location;
- Determine the nature of the emergency;
- Determine the type of help required.

**If the incident does not involve serious injury or fatality, and/or is not likely to attract media attention:**

- Provide the required assistance if possible;
- Seek further advice or pass on details to other establishment contacts who may be able to assist.

**If the incident does involve serious injury or fatality, and/or is likely to attract media attention:**

- Inform the Visit Leader that someone will phone him/her back within 30 minutes;

**It is the responsibility of the Visit Leader to contact the LA. However circumstances may prevent this. If you are not 100% positive that the LA has been contacted, please contact Warrington Borough Council on 01925 444400 and state that you require immediate assistance from the Emergency Response Team. Give brief details of the incident.**

- Your details will be taken and you will be phoned back within 30 minutes;
- You should also contact the Head of Establishment (if this is not you);
- A Response Team will be brought into action to support the party, the establishment, and the parents. Teams of senior officers are briefed for this role and will provide continuous support from the moment the emergency occurs. The team would operate from the Emergency Control Centre and the Head of Establishment or a senior member of staff may be asked to join the team immediately;
- The Head of Establishment should consider the appropriate time to contact the parents of the participants involved on the visit. Advice and support should be sought from the LA in dealing with this.
- The Response Team will form a continuous link with the affected group, and depending on the level of emergency will send a senior officer to the incident location. The Response Team will direct all actions; provide links with the media, rescue agencies, tour operators, insurance companies, etc. As appropriate the Response Team would arrange for the return of the party or arrange other transport where required;
- You will be provided with a dedicated number to refer all press, media, parental, or other enquiries to the LA and for continuing contact with the LA during the incident.
- The LA will give accurate and periodic information through press releases, will arrange interviews, and will attempt to reduce media pressure from the incident, establishment, and parents. If appropriate, support and counselling will be arranged for families, participants and staff.

Name	Home	Mobile
Head of Establishment		
Deputy Head of Establishment		
WBC Emergency Call Centre (for <b>initial</b> contact during an emergency only)	<b>01925 444400</b>	-

Chair of Governing Body (optional)		
Other/EVC		

NOTES:

## Contacts

<b>Evolve</b>	<a href="http://www.warringtonvisits.org.uk">www.warringtonvisits.org.uk</a>
<b>Educational Visits Adviser</b>	Sarah Holmes 01925 442831 <a href="mailto:sholmes@warrington.gov.uk">sholmes@warrington.gov.uk</a>
<b>Insurance</b>	WBC SLA Insurance Alison Weir 01925 442613 <a href="mailto:Alison.Weir@warrington.gov.uk">Alison.Weir@warrington.gov.uk</a>
<b>LA Emergency Contact (24 hour)</b>	Warrington Borough Council 01925 444400

**LOtC** [www.lotc.org.uk](http://www.lotc.org.uk)

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

**OEAP National Guidance** [www.oeapng.info](http://www.oeapng.info)

