



Cumbria County Council

Policy for the Management of Outdoor and Experiential Learning and Educational Visits

Value statement: Cumbria County Council recognises and understands the potential of outdoor and experiential learning as a powerful vehicle to enhance personal and social development.

Aim: To promote personal and social development with the aim of improving attendance, behaviour and achievement.

Purpose: This policy is designed to support Headteachers, Youth Workers, Educational Visits Coordinators and Visit Leaders to ensure young people in Cumbria benefit from memorable learning experiences within a framework of safety and quality.

The following policy has been revised and updated in line with the following guidance:

- Health and Safety Executive
- Department for Education
- Outdoor Education Advisers Panel – National Guidance

Duties as an employer

Under the Health and Safety at Work etc. Act 1974, the employer in a school and wider Children's Services must take reasonable steps to ensure that staff and pupils are not exposed to risks to their health and safety. This applies to activities on or off site.

Regulations made under the Health and Safety at Work etc. Act 1974 set out in more detail what actions employers are required to take. For example, the Management of Health and Safety at Work Regulations 1999 require employers to:

- assess the risks to staff and others affected by school activities in order to identify the health and safety measures that are necessary and, in certain circumstances, keep a record of the significant findings of that assessment;
- introduce measures to manage those risks (risk management);
- tell their employees about the risks and measures to be taken to manage the risks;
- ensure that adequate training is given to employees on health and safety matters;
- schools and Children's Services must set out their health and safety arrangements in a written health and safety policy. Cumbria County Council provides policy guidance documents for use by all community and voluntary controlled schools, and these may also be adopted and tailored by schools which subscribe to the Local Authority's Health and Safety Service;
- employers retain responsibility for the health and safety of children and young people.

1. Provision of CCC employer guidance

Cumbria County Council has formally adopted the Outdoor Education Advisers' Panel '**National Guidance**'. This guidance can be found on the following website:

www.oeapng.info

It is a legal expectation that employees **must** work within the requirements of their employer's guidance. School-based teaching staff as employees must follow the requirements and recommendations of the 'National Guidance' (NG) on the above website, as well as the requirements of this Policy statement.

Where another employer (such as the Governing Body of a voluntary aided school) wishes to opt into **Cumbria County Council's** guidance, systems and processes for supporting and monitoring '**Learning Outside the Classroom**' (LOtC) activities, they should produce a policy statement that makes this clear.

Where a **Cumbria County Council** employee commissions LOtC activity, they must ensure that such a commissioned agent has either:

1. adopted **Cumbria County Council** employer guidance

or

2. put systems and procedures in place where the standards are not less than those required by OEAP National Guidance.

2. Scope and remit

The NG (National Guidance on www.oeapng.info) document [Basic Essentials - Status, Remit and Rationale](#) 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, indirect and remote supervision of young people undertaking experiences beyond the boundary of their normal operational base;
- direct, indirect and remote 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 [Underpinning Legal Framework](#).

3. Ensuring understanding of basic requirements

As an employer, **Cumbria County Council** is required to ensure that its employees are provided with:

- appropriate guidance relating to visits and LOtC activity;
- 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 who have proven expertise and professional understanding of the guidance, training and expectations set by current good practice.

The appropriate guidance for the management of outdoor learning and LOtC in Cumbria is the National Guidance on the www.oeapng.info website.

The relevant training courses in Cumbria are:

1. **Cumbria County Council Educational Visits Coordinator (EVC) Training** - all community and voluntary controlled schools are required to have a current EVC in post;
2. **Cumbria County Council Educational Visits Coordinator (EVC) Revalidation** - all community and voluntary controlled schools are required to ensure that their EVC undertakes a formal revalidation every three years;
3. **Cumbria County Council Visit Leader Training** - this course is strongly recommended for all those who lead LOtC activities. Those who have not attended this training must be able to demonstrate equivalent competence through experience. 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, so update refresher training is strongly recommended.

For the purposes of day-to-day updating of information, Cumbria EVCs and Visit/Activity Leaders are directed to the posting of '*EVC & VL Information Updates*' (which include information on how to access the relevant courses) available on the following web link:

CCC EVOLVE: www.cumbriaccvisits.org.uk

Where an employee experiences problems with finding the material they are looking for, or requires 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 advisor in Cumbria is:

Matthew Ellis

Outdoor Learning and Educational Visits Adviser
Derwent Hill
Portinscale
Keswick
Cumbria, CA12 5RD

Tel: 017687 72005

H&S email: healthandsafety@cumbria.gov.uk

Educational Visits Advisory Service email: evas@sunderland.gov.uk

4. Approval and notification of activities and visits

Employer guidance **must** provide clarity on issues where functions are delegated. This is particularly critical in establishing requirements regarding formal notification and formal approval of activities.

- Cumbria County Council uses an online system called '**Evolve**' for notification and approval. A key feature of this system is that visits and LOtC activities requiring approval are automatically brought to the attention of the Local Authority. Those visits and activities not requiring approval may be viewed, sampled or monitored using the database and diary facilities of the system.

Further information should be sought through the Evolve system or by contacting the Educational Visits Advisory Service. A list of adventure activities is provided in [Appendix 1](#) of this document.

- School/service employees who wish to lead adventure activities must have approval to do so from the EVAS on behalf of the Council, unless the authority to approve visits involving adventure activities has been delegated to the Headteacher/Service Manager. Approval will be based upon evidence of competence, which may include evidence of relevant qualifications, training and experience. Further advice should be sought from the Educational Visits Advisory Service where a school/service routinely organises and conducts adventure activities and finds the requirement for EVAS approval on each occasion to be restrictive.
- It is a requirement that all community and voluntary controlled schools (including voluntary aided and foundation schools and academies which have subscribed to the Educational Visits SLA) use the **Evolve** system; for further advice and help using the system, the establishment should contact the nominated adviser (see [Section 3](#)). As the LA is not the employer in aided and foundation schools and academies, approval must be sought from the Governors or the school management in addition to the LA.

Level 2 visits involve travelling abroad, residentials or engaging in adventure activities. Level 2 visits need approval from the Outdoor Education Advisor.

Level 1 visits include all visits except those that meet the criteria for Level 2, and are approved locally in school by the EVC and Headteacher. It is recommended that Level 1 visits are also logged on the system.

5. Risk management

As an employer, Cumbria County Council has a legal duty to ensure that risks are managed, requiring them to be reduced to an 'acceptable' or 'tolerable' level, as it is recognised that elimination is not always possible or reasonable. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring Cumbria County Council to provide such support, training and resources for its employees as is necessary to implement this policy. The HSE endorses this approach through their [Leading sensible health and safety management in schools](#) document and advocates 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 Cumbria County 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 any significant risks, i.e. those that might cause serious harm to an individual or might harm several people. However, Cumbria County Council EVC Training ensures that establishments are supplied with an electronic portfolio of exemplar generic risk-benefit assessments, as well as exemplar event-specific assessments. These risk management materials can also be accessed through the following web link:

CCC EVOLVE: www.cumbriaccvisits.org.uk

Establishments must adopt and adapt these materials to ease the burden of bureaucracy that might otherwise discourage leaders from making full use of LOtC learning opportunities.

Refer to LOtC NG document '*Risk Management*'.

6. Emergency planning and critical incident support

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;
- has gone missing for a significant and unacceptable period.

Serious incidents on off-site visits are rare but they do happen. Minor incidents whether they be accidents or other emergencies, are more common. Effective planning and risk assessment means that the likelihood of any of these events is reduced, and where they do occur, the impact and consequences can be minimised.

As an employer, Cumbria County Council is committed to providing emergency planning procedures to support establishments in the event of a critical incident.

Refer to National Guidance document [Emergencies and Critical Incidents](#).

To activate support from Cumbria County Council, the following telephone numbers should be used:

Normal office hours: 01228 221616

Outside normal office hours: 0300 303 1042

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.

The Headteacher and Service Managers are responsible for ensuring timely reporting and investigation of accidents and incidents. Please refer to the [SIGN 03 Reporting, recording and investigation of adverse events](#), for further information.

7. Monitoring

As an employer, Cumbria County Council 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 LOtC 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 [Monitoring](#).

8. Assessment of leader competence

OEAP National Guidance provides clear advice regarding the assessment of leader competence. It is a Cumbria County Council policy expectation that all leaders and their assistants have been formally endorsed as being competent to undertake such responsibilities as they have been assigned in line with the National Guidance.

Refer to NG document [Approval of Leaders](#).

9. Role-specific requirements and recommendations

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

1. [Director of Children's Services or equivalent role](#)
2. [Lead Member\(s\) for Children's Services](#)
3. [Outdoor Education Adviser Line Manager](#)
4. [Outdoor Education Adviser](#)

5. [Manager of an Outdoor Learning Centre or Facility](#)

Refer to individual NG documents headed as above.

Similarly, National Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within most educational settings. These are:

1. [Member of Management Board or Governing Body](#)
2. [Headteacher/Manager](#)
3. [Educational Visits Coordinator](#)
4. [Visit or Activity Leader](#)
5. [Assistant Leader](#)
6. [Helper](#)
7. [Parents](#)

Refer to individual National Guidance documents headed as above.

10. Charges for off-site activities and visits

Cumbria County Council, Headteachers, Managers, Curriculum Planners, EVC's 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 [Charging for School Activities](#).

11. Vetting and DBS checks

Cumbria County Council employees who work *frequently* or *intensively* with or have *regular access* to young people or vulnerable adults must undergo an enhanced DBS check as part of their recruitment process.

An activity is considered Regulated Activity (RA) in relation to **children** if carried out unsupervised in school (a specified setting) frequently (once a week or more often), or on 4 or more days in a 30-day period and by the same person engaging in work for or in connection with the purposes of the establishment; and it gives the person the opportunity, in carrying out their work, to have contact with children. The Act has broadly removed 'supervised work' from RA, which if unsupervised *would* be RA. The government is producing guidance on supervision and this is available in: <http://www.education.gov.uk/childrenandyoungpeople/safeguardingchildren>

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.

Refer to NG document [Vetting and Disclosure and Barring Service \(DBS\) 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'.

Effective supervision should be determined by risk assessment including proper consideration of:

- staff/leader competence;
- nature of the activity;
- needs of the group, age (including the developmental age), 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, prevailing conditions and distance from base;
- seasonal factors, such as time of year, light levels, temperatures and weather conditions;
- environment (urban, rural, language and cultural differences, access to telephone, WiFi, 3G/4G coverage etc.).

However, as an exception to the above, Ofsted and DfE guidance prescribe ratios for Early Years.

Refer to NG document [**Ratios and Effective Supervision.**](#)

Refer to NG document [**Group Management and Supervision.**](#)

Visit Leaders and EVC's can then decide if direct, indirect, or remote supervision is required.

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, thus reducing bureaucracy.

Examples of such schemes include:

- The Learning Outside the Classroom (LOtC) Quality Badge;
- Adventure Activities Licence;
- Adventuremark;
- National Governing Body (NGB) centre approval schemes (applicable where the provision is a single, specialist activity).

Cumbria County Council takes the view that where a provider holds such one of the above accreditations, there should be no need to seek further assurances.

Refer to NG document [**Preliminary Visits and Provider Assurances.**](#)

14. Insurance for off-site activities and visits

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

Cumbria County Council Visit and Activity Leaders should contact the Local Authority Insurance Section to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the insurer. 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 [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, Headteachers/Managers, Curriculum Planners, EVC's and Visit Leaders should be aware of the extent to which Inclusion is or is not a legal issue.

Refer to NG document [Inclusion](#).

16. Adventure Activities Licensing Regulations 2004

Employers, Headteachers/Managers, EVC's 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 2004 and the Adventure Activities Licensing Authority (AALA), initially responsible to the DfES. The scheme is now the direct responsibility of the HSE.

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 ensure 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 licence is an inspection of safety. It does not accredit educational or activity quality.

Cumbria Outdoors centres are providers of 'in scope' activities as defined by the regulations and they are required to be licensed.

Refer to NG document [Adventure Activity Licensing](#).

17. Good practice requirements

To be deemed competent, a Visit/Activity Leader must be able to demonstrate the ability to operate to the current standards of recognized 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 Visit or Activity 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 the 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 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 assessment.

Refer to NG document [Good Practice - the Basics](#).

18. Transport

Schools should refer to Safety Information Guidance Note [SIGN 11 Occupational road risk - driving for work including minibuses.pdf](#) when planning transport to support off-site activities and visits.

The Visit Leader should ensure that coaches and buses are hired from a reputable company.

When considering what supervision is required for the specific group of passengers being transported in a minibus, driver distraction must be included as part of the risk management process.

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

Refer to NG document [Transport: General Considerations.](#)

Refer to NG document [Transport in Minibuses.](#)

Refer to NG document [Transport in Private Cars.](#)

19. 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 ensure that assurances have already been obtained by credible inspection regimes);
- designated emergency contact(s) have been identified who will work on a 24/7 basis where required;
- all details of the activity provision are accessible to the emergency contact(s) throughout the period of the activity.

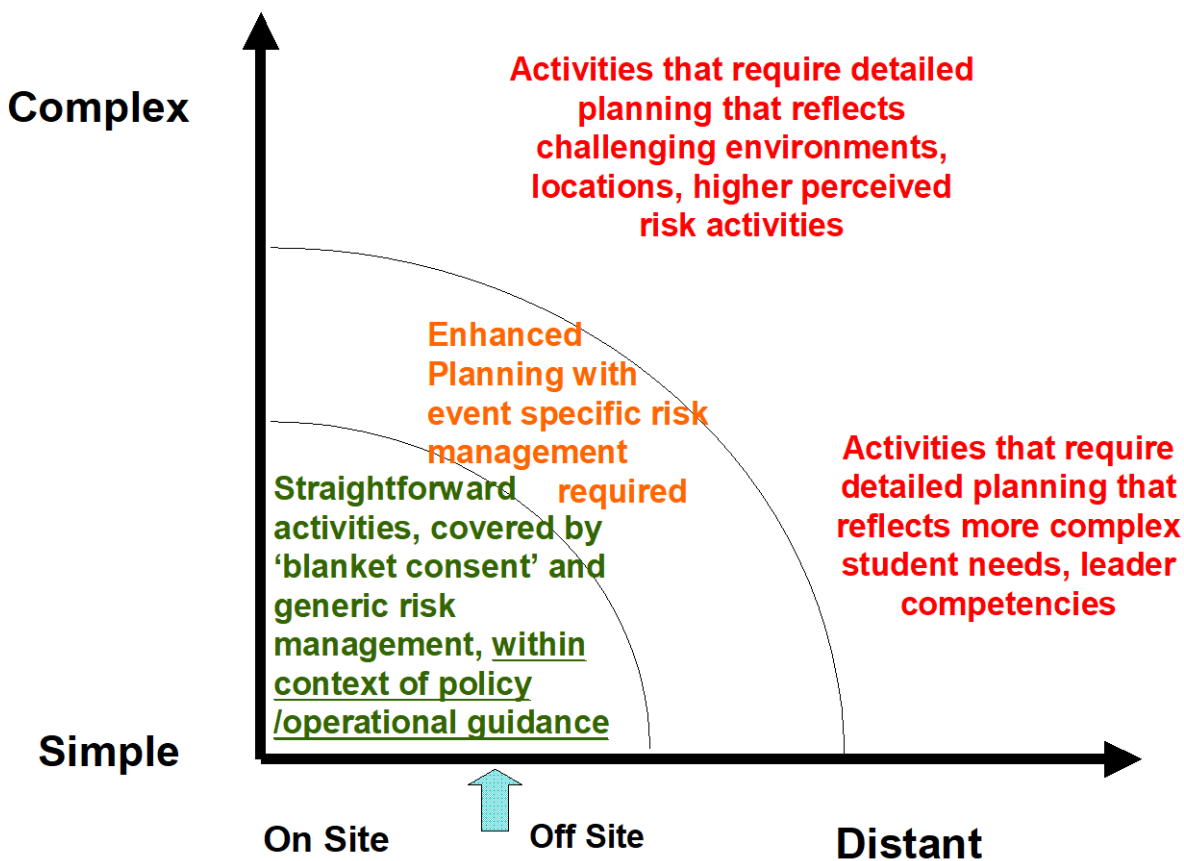
It is strongly recommended that at a very early stage of the planning process, the provisional staffing team carry out a brainstorming exercise in order to identify the benefits and learning outcomes that the activity (or range of activities) might achieve. If the outcomes are to be evaluated with any 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 ongoing 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:

- **S**taffing requirements – Trained? Experienced? Competent? Ratios?
- **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 [Policies, Planning and Evaluation](#).

20. The value and evaluation of learning outside the classroom

National Guidance document [Self-Evaluation and the Ofsted Framework](#)

Next review of this policy is due on or before December 2023.

FURTHER INFORMATION

External links:

Health and Safety Executive: www.hse.gov.uk

Government departments: Education, Transport, etc.: www.gov.uk
Outdoor Education Advisers' Panel: www.oeapng.info
CLEAPSS provides advice on science safety: <https://www.cleapss.org.uk/>
Association for Science Education: <https://www.ase.org.uk/>
Association for PE: <https://www.afpe.org.uk/physical-education/>
Council for Learning Outside the Classroom: <https://www.lotcqualitybadge.org.uk/>

Appendix 1

Adventure activities

Adventure activities are defined as including:

- Abseiling.
- Air activities (excluding commercial flights).
- Camping (except 'official' campsites).
- Caving, potholing, mine exploration.
- Climbing (including indoor climbing walls).
- Coastering, coastal scrambling, sea-level traversing.
- Fishing in hazardous environments (e.g. sea, fast rivers, or deep water).
- High level ropes activities.
- Horse riding and equestrian sports.
- Motor sport – all forms.
- Mountain biking.
- River/gorge/ghyll walking or scrambling, canyoning.
- Shooting, archery, paintballing.
- Skiing (including indoor or dry slope).
- Snorkel and aqualung activities.
- Snowboarding (including indoor or dry slope).
- Swimming (all forms, excluding UK public pools with lifeguards).
- Walking (hills, mountains, open country).
- Water sports - powered craft, water-skiing (excluding commercial transport).
- Water sports - canoeing/kayaking.
- Water sports - rafting or improvised rafting.
- Water sports - rowing.
- Water sports - sailing/windsurfing/kite surfing.
- Water sports - surfing.

Remote or hazardous locations **may** include:

- areas over 600m.
- areas more than 30 minutes' walk from a road or refuge.
- significant water hazards (e.g. fast rivers and/or deep water).
- coastal areas with significant surf and/or tidal hazards.
- hazardous quarries.
- steep terrain.

These lists are **not exhaustive**: if in doubt, advice should be obtained from the Educational Visits Advisory Service.