Offsite Visits Policy
Learning Outside the Classroom (LOtC)

2019 – 2020

(Updated June 2015)
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If you would like this information in another language or format contact:

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Policy for the Management of Learning Outside the Classroom (LOtC)

Current copies of this document along with additional guidance, forms, model risk assessments, etc are available on Walsall Link: Human Resources - Direct & Strategic Services > Health & Safety > Offsite Visits (you will need to log in).

Provision of National Guidance

Walsall Council has formally adopted the Outdoor Education Advisers' Panel (OEAP) National Guidance as an integral part of Walsall Council’s ‘Learning outside the classroom (LOtC) and visits policy’. This summary document outlines the main requirements for LOtC and gives links to appropriate sections of the National Guidance if additional information may be required.

Note: links are provided to the main folders of the National Guidance rather than to specific sections. This is because the section links (to individual PDFs) often became out of date as OEAP updated their guidance and uploaded new PDFs. Folder links avoid this problem.

The law requires that employees must cooperate with their employer and follow any health & safety procedures that are put in place; therefore, council employees must follow the requirements of this Policy and of the adopted National Guidance. In addition, council employees should also follow any recommendations contained in the National Guidance.

Where another employer (such as the governing body of a voluntary aided school) wishes to opt into Walsall’s guidance, systems and processes for supporting LOtC activities, they should produce a policy statement that makes this clear.

Where a LOtC activity is commissioned from an external body, the person commissioning should ensure that that body has adopted the National Guidance, or has systems and procedures in place where the standards are not less than those required by the National Guidance.

Scope and remit

The National Guidance document Status, Remit and Rationale (part of the Basic Essentials folder) clarifies the range of employees whose work requires them to use the guidance. In summary, it applies to employees whose work involves any 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.

The ‘Status...’ document briefly touches on legal duties associated with LOtC. For a more detailed explanation of the law and its implications, you are strongly recommended to read the National Guidance document Underpinning Legal Framework.
Role-specific requirements and recommendations

The National Guidance sets out requirements and recommendations for employers, which include role specific requirements for:

- Director of Children’s Services and Lead Member(s) for Children’s Services
- Line manager of an outdoor education adviser (or equivalent post)
- Outdoor education adviser (OEA)
- Advisers (other than an OEA); including health & safety officers
- Manager of an outdoor centre

Where there is not an exact fit to these roles (e.g. in VA schools, foundations and academies); those employers should apply the same underpinning principles to their management systems.

See National Guidance: Legal framework and employer systems for information on individual roles.

The National Guidance also sets out requirements and recommendations for roles within establishments, including:

- Management Boards and Governing Bodies
- Head teachers and managers
- Educational visit coordinators
- Visit and activity leaders
- Assistant leaders
- Volunteer helpers
- Those in a position of parental responsibility

See National Guidance: Legal framework and employer systems for information on individual roles.

Ensuring understanding of basic requirements

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

- appropriate guidance relating to visits and LOtC activities
- training to support the guidance and to help ensure that it is understood
- suitable systems and processes to ensure that those trained are kept updated
- access to advice and support from appointed advisers that have proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

‘Appropriate guidance’ for visits and LOtC in Walsall is the adopted National Guidance produced by OEAP.

The relevant training courses in Walsall are:

- Educational Visit Coordinator (EVC) training - all Walsall Children’s Services establishments are required to have a current, Walsall-trained, EVC in post. EVCs should attend revalidation (refresher) training periodically (e.g. every three years) or other appropriate systems should be in place to ensure EVCs stay up to date with current systems and best practice.
Visit Leader training - this course is strongly recommended for all those who lead LOtC activities. Currently there is no revalidation required; however, to meet National Guidance competency requirements, leaders must be current in their knowledge of expectations of good practice, so periodic refresher training is strongly recommended.

Please contact the health & safety team for further information.

Any updates to the policy, etc, that EVCs or visit leaders should be aware of will be available on Walsall Link: Human Resources - Direct & Strategic Services > Health & Safety > Offsite Visits.

Where staff require clarification or further help and advice on visits, they should initially contact their EVC. Further professional support is available from the advisers in the health & safety team:

- 01922 655793
- safetyandfire@walsall.gov.uk

Good practice requirements

Good practice is essentially common sense. It arises from a consideration of all the circumstances that apply to the planning, preparation, execution and review of any activity.

Planning should involve:

- Knowledge of the nature of the activity, the location and/or the facilities to be visited.
- Consideration for the particular needs of the specific group of young people.
- Awareness and anticipation of situations that could arise, and thorough preparation for all reasonably foreseeable eventualities including the need for alternatives.

Staff participating in offsite 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 this guidance.

All staff and helpers must be competent to carry out their defined roles and responsibilities. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff.

To be deemed competent, a visit/activity leader, or assistant leader must be able to demonstrate the ability to operate to the current standards of recognised good practice for that role. The National Guidance sets out a clear standard to which leaders must work. The guidance states:

‘A competent leader requires:

- Knowledge and understanding of their employer’s guidance supported by establishment-led 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
- The capacity to react effectively and efficiently when things do not go as planned during a visit
- In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification.’

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, particularly if there is a serious incident when the helper may be distracted by the needs of their own child. The visit leader should directly address this issue as part of the risk assessment.

Refer to National Guidance document: **Good Practice Basics**

**Risk management**

The Management of Health & Safety at Work Regulations require employers to assess risks in the workplace. A risk assessment is simply a careful examination of what, in your work, could cause harm to people, so that you can weigh up whether you have taken enough precautions or should do more to prevent harm.

Normally, for instance in a workshop, the aim is to eliminate risk wherever possible; however, with offsite visits eliminating all risk could also remove many of the benefits associated with the activity and hence would be counterproductive. Consequently, whilst risk should be managed, and should be at ‘acceptable levels’, there needs to be a careful balance between the risk of the activity and the benefits of participation and the learning outcomes.

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.

Risk assessments should be recorded and should identify appropriate controls to minimise the risk of serious harm to students or staff.

Department for Education guidance (2011) states, ‘a written [risk] assessment is not needed for every activity’. To be clear, a risk assessment must be carried out for all activities and visits, but for straightforward activities in familiar territory, a generic written risk assessment is often sufficient and an event-specific written risk assessment is often only necessary in exceptional circumstances.

Walsall Children’s Services health & safety team have produced a range of generic risk assessments relating to offsite visits for schools/centres to adapt and adopt. These are available on Walsall Link: Human Resources - Direct & Strategic Services > Health & Safety > **Offsite Visits**.

Refer to National Guidance document: **Risk Management**

**Planning**

Planning should reflect your establishment’s procedures, employer’s requirements, legal requirements and good practice. You should ensure that:

- 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 an early stage of the planning process, it is good practice to carry out a brainstorming exercise, in order to identify the benefits and learning outcomes that the 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 can also provide some objectivity for the risk-benefit assessment. Once the targeted outcomes have been recorded, it will then be possible to identify appropriate ongoing review and evaluation strategies, including indicators.

It can be helpful to develop activity-specific policies at establishment level for regular or routine activities. Such policies should be robust and equate to ‘operational procedures’ that make it clear how the activity is planned and delivered, as well as assuring educational quality. Such operational procedures can serve as generic risk-benefit assessments, induction checklists for new staff, and monitoring checklists for senior managers.

There should be procedures in place to ensure that parents are informed of the whole range of activities covered by such policies, typically in a newsletter/prospectus at the beginning of term or new school year.

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’:

- Staffing requirements - trained? experienced? competent? ratios?
- Activity characteristics - specialist? insurance issues? licensable?
- Group characteristics - prior experience? ability? behaviour? special/medical needs?
- Environmental conditions - like last time? impact of weather? water levels?
- Distance from support mechanisms in place at the home base - transport? residential?

Refer to National Guidance document: Planning Basics for Outdoor Learning

**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-benefit management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. Your school/centre’s offsite visits policy should clarify the circumstances where a preliminary visit is a requirement.

Where a preliminary visit is not reasonably practicable, you should consider how you will gather sufficient information to make an adequate assessment of the risk-benefit management issues. One way to do this is to take advantage of the nationally accredited provider assurance schemes that are now available. This will also reduce your workload and streamline bureaucracy.

Examples of such schemes include:
The LOtC Quality Badge (which covers both quality and safety)
- Adventure Activities Licensing Authority (AALS) licence
- Adventuremark
- NGB centre approval schemes (applicable where the provision is a single, specialist activity).

If the provider holds such an accreditation, there should be no need to seek further assurances about the areas that it covers.

Refer to: National Guidance document Preliminary Visits and Provider Assurances

Approval and notification of activities and visits
Walsall council delegates the responsibility for formal approval of all visits and LOtC activity to establishment head teachers/managers. It is a requirement of this policy that head teacher and managers carry out this function in accordance with the policy.

Although approval is delegated, establishments must notify the council’s Resilience Unit (Emergency Planning) in advance of any higher risk visits and activities; that is those that:
- involve a residential or overnight stay (at home or abroad)
- involve an activity by open water
- involve the provision of an adventurous activity

The notification procedure requires an ‘Offsite Visits Notification Form’ and list of participants (with emergency contacts and medical history, etc) to be emailed to the resilience unit (see form for contact details). Notification forms are available on Walsall Link: Human Resources - Direct & Strategic Services > Health & Safety > Offsite Visits.

See also Duke of Edinburgh's Award section below.

Monitoring
Employers must ensure that any systems they put in place are effectively monitored. Walsall Children’s Services' health & safety team will carry out certain checks on offsite visit arrangements as part of the auditing process; however, the main monitoring role within council schools and centres is delegated to head teachers/centre managers and their EVCs.

Schools/centres and their EVCs should ensure that appropriate systems are in place for monitoring offsite visits. Monitoring includes checks on procedures, checks on training, reviews following visits, and sampling (field observation) to check that procedures are followed during visits. Further information on monitoring is available in the National Guidance.

Refer to National Guidance document: Monitoring

Assessment of leader competence
All visit leaders and their assistants should be formally assessed to ensure they are competent to carry out the role and any duties assigned to them.

The National Guidance provides further advice regarding the assessment of leader competence.

Refer to National Guidance document: Assessment of Competence

Aug 2013 (version 2.1)
Emergency planning and critical incident support
A critical incident is an incident where any member of a group undertaking a LOtC activity:

- has suffered a life threatening injury or fatality
- is at serious risk; or
- has gone missing for a significant and unacceptable period.

The council has a number of support mechanisms in place, including critical incident plans; to help schools should an incident arise. These are activated via the council’s Resilience Unit (formally Emergency Planning), using the following telephone numbers:

- Normal office hours: 01922 652026
- Outside normal office hours: 01922 653252

These numbers should be carried by all staff members at all times during an offsite 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.**

Refer to National Guidance document: [Critical Incident Management for Visits](#)

Ratios and effective supervision
Except in Early Years, the law does not prescribe activity-specific staffing ratios; however, it does require that the level of supervision and group management is ‘effective’. Effective supervision should be determined by a risk assessment that takes account of:

- The nature of the activity (including its duration)
- The location and environment in which the activity is to take place
- The age and gender (including developmental age) of the young people to be supervised
- The ability of the young people (including their behavioural, medical, emotional and educational needs)
- Staff competence

The Early Years and Foundation Stage Statutory Framework sets out specific legal requirements for minimum ratios in this age group, which apply both indoors and on outings.

Refer to National Guidance document: [Ratios and Effective Supervision](#)

Refer to National Guidance document: [Group Management and Supervision](#)

Transport
When planning offsite visits, establishments should give particular consideration to transport issues. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it; therefore establishments **must** follow any guidance provided (e.g. council establishments must adhere to the ‘Driver, Vehicle and Road Safety’ Safety Management Standard). All national and local regulatory requirements **must** be followed.

A number of factors should be considered as part of your transport risk assessment; including - driver competence, maintenance of vehicles, insurance, seat belts, weather conditions and driver fatigue.
The level of supervision necessary should be also considered; remember, the driver of a vehicle transporting children or young people cannot drive and supervise at the same time. Therefore a key judgement needs to be made about the likely behaviour and individual needs of the passengers. If any of the children or young people may require close supervision, then another adult should travel in the vehicle so that the driver is not distracted. Note: in the interests of safeguarding, it is strongly recommended that a minimum of two adults travel in each vehicle.

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.

Refer to National Guidance document: [Transport: General Considerations](#)

Refer to National Guidance document: [Transport in Minibuses](#)

Refer to National Guidance document: [Transport in Private Cars](#)

### Charges for offsite activities and visits

Head teachers, managers, curriculum planners, EVCs and visit/activity leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996.

Refer to National Guidance document: [Charges for Outdoor Learning](#)

### Insurance for offsite visits

**Employer’s Liability Insurance** is a statutory requirement and the council holds a policy that indemnifies it against all claims for compensation for bodily injury suffered by any person employed by it. This cover extends to those persons who are acting in a voluntary capacity as assistant supervisors.

The 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 council) are indemnified against all such claims, as are voluntary helpers acting under the direction of council staff. The indemnity covers activities such as offsite visits organised by all establishments and settings for which the council is responsible.

Some level of **Personal Accident Insurance** is provided for council employees in the course of their employment, providing predetermined benefits in the event of an accident. However, visit and activity leaders are advised that they may wish to consider taking out more comprehensive personal accident cover privately, or obtain cover through a professional association.

Visit and activity leaders should contact the council’s risk and insurance section (01922 652909) if they need clarification of any of the above, or advice on any circumstances requiring early notification of specialist activities to the council’s insurer.

Where insurance is not provided via the council, those establishments should ensure they have appropriate insurance in place, similar to that outlined above.

Refer to National Guidance document: [Insurance](#)
Parental Consent
Consent forms have often been used in the past as a means to get updated information about medical issues, food allergies etc. for young people. It is essential to ensure that this information is available: each establishment should have some means of providing relevant information to activity/visit leaders.

Schools are not required to obtain written consent from parents for pupils to take part in offsite activities that take place during school hours (with the exception of nursery age children). For those that take place outside school hours, the Department for Education (DfE) has prepared a one-off consent form to be signed when the child enrolls in a school (a similar form could be used for youth groups, etc). This would cover all types of visits and activities routinely organised by the establishment for which information has been given to parents (perhaps in the establishment’s prospectus). The form is available on the DfE website for establishments to adopt and adapt as appropriate, at [http://media.education.gov.uk/assets/files/doc/d/dfe%20consent%20form.doc](http://media.education.gov.uk/assets/files/doc/d/dfe%20consent%20form.doc)

Refer to National Guidance document: Consent

Vetting and DBS checks
Individuals who engage in regulated activity with young people or vulnerable adults should undergo an enhanced DBS check, with barred list check, as part of their recruitment process. It is the responsibility of the organisation engaging the individual to decide if a particular role falls within the legal definition of regulated activity.

It must be clearly understood that a DBS check, in itself, is no guarantee as to the suitability of an individual to work with any given group of young or vulnerable people. The placement of an adult in a situation of professional trust with young people should always be subject to a robust recruitment and engagement system including references, interview, induction, training and monitoring, as well as a DBS check if this is appropriate.

Refer to National Guidance document: Vetting and DBS checks

Inclusion
The Equality Act 2010 replaced previous anti-discrimination legislation (such as The Disability Discrimination Act). The new Act uses different wording and some different concepts from those used previously but makes only a few changes to the substance of existing law.

The Act states that the responsible body of a school must not discriminate, harass or victimise a pupil to whom one of the protected characteristics applies (Disability; Gender reassignment; Pregnancy and maternity; Race; Religion or belief; Sex and sexual orientation) in the way that it affords (or not) the pupil access to a benefit, facility or service. There is a duty to make reasonable adjustments.

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, religion or any of the other protected characteristics. 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

Further information on inclusion, including circumstances where it is reasonable to exclude a young person, e.g. on grounds of behaviour, is available in the National Guidance.

Refer to National Guidance document: Inclusion

**Duke of Edinburgh’s Award**

Walsall Council is the licensed DofE Operating Authority for groups registered in Walsall borough to deliver DofE programmes to young people aged 14 to 25. These groups and organisations may be schools, FE and HE colleges, youth clubs, voluntary organisations or employers. This arrangement is unique in terms of Walsall Council’s ‘Learning outside the classroom (LOtC) and visits policy’ in that groups not normally thought to be part of the council will need to ensure they meet the needs and requirements of the council’s policy and procedures in delivering offsite activities.

Any group operating under the council’s DofE License must adhere to the council’s policies, guidelines and systems for offsite/DofE visits. These policies, etc., apply to all those participating in the Duke of Edinburgh’s Award.

The policy applies mainly to the ‘Expedition’ section; but is relevant to all DofE sectional activities (such as canoeing for the ‘Physical’ section).

DofE Leaders should be familiar with Walsall Council’s DofE policies and procedures, and the LOtC policy. They should also consult and familiarise themselves with the DofE Leaders Handbook and DofE Expedition Guide.

All expedition ventures must be notified to Walsall Council’s DofE coordinator and approval must be granted before the venture takes place to ensure the activity qualifies as a DofE activity.

- 01922 655419
- Walsall Council DofE Coordinator
  My Place, 60 Walstead Road West, Walsall, WS5 4PE

‘Expedition Notification’ and ‘Expedition Notification Group Details’ forms will shortly be available on Walsall Link: Human Resources - Direct & Strategic Services > Health & Safety > Offsite Visits; in the meantime, please contact the DofE coordinator directly if you need copies.

Refer to National Guidance document: Duke of Edinburgh’s Award (DofE) Expeditions

Refer to: Walsall Council DofE Service Level Agreement and Policy & Procedures

**Adventure Activities Licensing Regulations**

Employers, head teachers/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 established the Adventure Activities Licensing Regulations and the Adventure Activities Licensing Authority (AALA) and made it a legal requirement for certain providers of adventure activities to be licensed by the Authority (a role undertaken by the HSE since 2007).
Only activities specified in the regulations come under the scheme. These ‘in scope’ activities are:
- caving,
- climbing (except on climbing walls or abseiling towers),
- trekking (as defined) and
- watersports (as defined).

HSE state - ‘The aim of adventure activities licensing is to provide assurances to the public about the safety of those activity providers who have been granted a licence. In this way it is expected that young people will be able to continue to enjoy exciting and stimulating activities outdoors without being exposed to avoidable risks of death or disabling injury.

A licence indicates that the provider has been inspected by the Adventure Activities Licensing Service on behalf of the Adventure Activities Licensing Authority, with particular attention being paid to their safety management systems with young people, and has been able to demonstrate compliance with nationally accepted standards of good practice in the delivery of adventure activities to young people, with due regard to the benefits and risks of the activity.’

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

Where Walsall’s outdoor centres are providers of ‘in scope’ activities as defined by the regulations, they are required to be licensed.

Refer to National Guidance document: [Adventurous Activity Licensing Regulations](#)

**The value and evaluation of LOtC**
The Ofsted report ‘Learning Outside the Classroom - How Far Should You Go?’ (2008) makes statements in the strongest terms to support the value of LOtC, including the fact that it raises achievement. However, it also highlights the finding that ‘even where LOtC is highly valued and provided to a high standard, it is rarely evaluated with sufficient rigor’ - i.e. in the way that classroom learning is evaluated. The National Guidance includes a section on [Rigorous Evaluation](#) that will be useful for head teachers, managers, EVCs and visit leaders.

Signed: 

Print: Mr James Pearce
Date: 8th July 2019
Headteacher

Signed: 

Print: Mr. Neil Ravenscroft
Date: 8th July 2019
Chair of Governors

Document control number: CP S034-03