

# Fieldwork & Expeditions

- Off-Site Safety Management
- Course curriculum

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## 1 Overview

### 1.1 Introduction

The Off-Site Safety Management course (OSSM) was designed in response to concerns about safety in off-site activities. It addresses the content of legislation in this area and provides an opportunity for attendees to explore the application of the legislation in practical situations.

The OSSM course will be appropriate for those working in a range of different situations where they are responsible for taking children/young people/adults out of their everyday environments (e.g. on geography or environmental field trips, on sporting away events, on organised activities). It aims to equip attendees with the ability to apply knowledge, understanding and problem solving skills in a range of contexts.

### 1.2 Aims

- To develop knowledge and understanding of off-site safety management procedures and the ability to apply this to a range of different contexts.
- To develop ability to plan, manage and evaluate off-site activities in order to ensure the safety of the participants.
- To develop skills that are relevant to the workplace and which can be adapted to meet different circumstances
- To encourage further study and promote the value of continuing professional development.

### 1.3 Target Group

The scheme is designed for adults working with both young people and adults where they will be required to plan, manage and evaluate off-site safety policies, procedures and activities. It will be particularly appropriate for teachers, lecturers, trainers and youth workers who are seeking to develop their knowledge and skills in off-site safety management. It is also relevant to those who work in organisations seeking compliance with the new British Standard, BS 8848: the specification for the provision of visits, fieldwork, expeditions, and adventurous activities, outside the United Kingdom.

### 1.4 Prior Learning

Although there are no formal entry requirements in terms of prior learning, attendees may find it helpful to draw on previous knowledge and experience of managing safety issues in the workplace. Basic understanding of planning processes and risk assessment and safety management may also provide useful starting points.



### **1.5 Guided Learning Hours**

It is suggested that an average delegate with the recommended prior learning should take around 15 guided learning hours to acquire the knowledge, understanding and skills necessary to meet the assessment objectives successfully. However this figure is for guidance only and will vary depending on individual delegates and the mode of delivery.

### **1.6 Progression**

The Off-Site Safety Management course has been designed to aid delegates in developing knowledge and understanding that would enhance their performance in the workplace and thus assisting in preparing them for greater responsibility.

### **1.7 Opportunities for addressing spiritual, moral, ethical, social and cultural issues**

Tutors delivering a course on Off-Site Safety Management would have opportunities to address these issues throughout the course.

Delegates will need to consider all of these issues when planning events for particular groups. They will need to consider the appropriateness of activities for different target groups where children/young people/adults have different social and cultural values and to identify issues that may arise in meeting these needs.

Additionally, as attendees will be responsible for the members of the group who are in their care, they will need to consider moral, ethical, social and cultural issues in relation to the influence that they will have over those for whom they are responsible. Attendees will need to consider issues when taking responsibility for children, young people and other adults in a range of different contexts including day trips, overnight visits and overseas excursions.

### **1.8 Opportunities for addressing health and safety issues, environmental issues and European developments**

Health and Safety issues are central to the purpose of the Off-Site Safety Management course and opportunities to address these issues will be present throughout the course of study. Delegates will be able to address health and safety in range of different contexts and to review the different issues affecting children/young adults/adults in different contexts.

Environmental concerns can be addressed in terms of identification and evaluation of potential off-site visits and also in terms of the impact of leading groups into particular areas. Delegates will be able to explore the range of information on environmental issues that they may need to share with the people who are in their groups; decisions on the way in which information is shared may also generate discussion of moral, ethical and social issues.

The Off-Site Safety Management course will also provide opportunities to address European developments. Delegates will be able to explore this in relation to taking groups abroad on off-site trips and also in relation to the way in which European legislation impacts on off-site safety management.

### **1.9 Opportunities for addressing legal and financial issues**

These will occur in considerations surrounding planning, management and evaluation of off-site activities/events. Delegates will need to explore, in particular, legal issues in relation to health and



safety and in relation to particular groups such as children and people with particular needs. There will opportunities to apply these considerations to a wide range of different contexts.

### **1.10 Relationship with National Occupational Standards**

The Off-Site Safety Management course has not been designed to address the requirements of a specific set of Occupational Standards. However, the focus on health and safety and the need to plan for the safety of others provides indirect links with a number of NVQs including those in: Sport, Recreation and Allied Occupations, Outdoor Education, Development Training, Recreation and in Events Management.

The course is consistent with the principles of occupational standards in that it:

- identifies the standard of competence to be achieved through the use of assessment objectives which are supported by underpinning knowledge and understanding
- includes technical, planning and problem solving skills which will enhance flexibility in employment and promote opportunities for progression
- ensures that the competence achieved is broad enough to be flexible and capable of adaptation to meet new and emerging occupational patterns
- includes statutory and legal obligations
- focuses on health and safety requirements
- is free from overt or covert discrimination against individuals
- is presented in plain language and a straightforward format to ensure accessibility for end users
- reflects best employment practice

### **1.11 Origins of the OSSM course**

The Off-Site Safety Management course was originally developed in partnership with the British Association of Advisers and Lecturers in Physical Education and the College of St Mark and St John by OCR. The management and administration of the Off-Site Safety Management course was passed to the Royal Geographical Society with IBG in 2008. All enquiries relating the Off-Site Safety Management course should be addressed to

## **2 Course Content**

### **2.1 Structure of the Course**

The Off-Site Safety Management course is designed to assist the delegates to develop sufficient knowledge and understanding manage groups going off-site safely.

The content is divided into three sections each representing a vital stage in managing an off-site activity/event.



The three sections are:

### **1 Planning for the event**

This section addresses those aspects of planning which must be completed before the group departs in order to ensure the safe management of the activity. It includes assessing the needs of the group, arranging the necessary staffing, and undertaking a risk assessment.

### **2 Managing the event**

This section addresses the key management requirements relating to group safety during an activity including appropriate actions and procedures required when dealing with both minor and major incidents and contingencies.

### **3 Evaluating the event**

This section addresses the essential review of the whole event that must be carried out to effectively improve future planning and practice.

## **2.2 Assessment Pattern**

The course is not currently assessed but delegates who successfully complete the course will be issued with an attendance certificate.

Should you wish to be alerted to any future opportunities to undertake a formal assessment or examination, please bring this to the attention of the course administrator or tutor.

Delegates should be able to apply their knowledge and understanding to three different scenarios. The three different scenarios are likely to be drawn from the following list:

- a local visit not requiring transport
- a day visit
- a UK residential visit
- an excursion abroad

## **2.3 Unit Content**

Learning Outcomes

Delegates following a course of study will develop skills in:

- Planning the programme and administration for an off-site visit/event effectively
- Identifying and working within the legal framework surrounding off-site activities
- Assessing the needs of a group and identifying the necessary staffing
- Undertaking reviews of safety requirements and risk assessments
- Outlining the key requirements relating to group safety during an activity
- Identifying appropriate actions and procedures to deal with both minor and major incidents
- Identifying key elements of an effective post-event evaluation report
- Preparing post-event evaluations for a specified audience



Learning Objectives	Knowledge and Understanding
<p><b>1 Planning for the event</b></p> <p>Demonstrate knowledge and understanding necessary for the safe planning of off-site activities.</p>	<p><b>Purpose of the Event</b></p> <ul style="list-style-type: none"><li>• Setting clear objectives for the visit</li></ul> <p><b>The Group</b></p> <ul style="list-style-type: none"><li>• Group composition:<ul style="list-style-type: none"><li>- Age</li><li>- Gender</li><li>- previous experience</li><li>- capability</li><li>- numbers</li><li>- match to activity</li><li>- fitness for the activity – if relevant</li><li>- social and cultural background</li></ul></li><li>• Group selection:<ul style="list-style-type: none"><li>- Known to the leader</li><li>- Behaviour</li><li>- Interest in topic</li><li>- Previous experience</li><li>- Maturity</li><li>- Gender balance</li></ul></li><li>• Catering for individual special needs:<ul style="list-style-type: none"><li>- Mobility</li><li>- Behaviour</li><li>- Psychological</li><li>- Medical</li></ul></li></ul> <p><b>Staffing</b></p> <ul style="list-style-type: none"><li>• Staffing requirements:<ul style="list-style-type: none"><li>- Ratio of staff to number in the group</li><li>- Ratio of staff to needs of group members/activity requirements</li><li>- Local/national requirements/guidelines</li><li>- Criminal clearance issues</li></ul></li><li>• Selecting staff:<ul style="list-style-type: none"><li>- Staff experience of the activity, location, age-group</li><li>- Personal qualities of staff – relationships, management, maturity, interests</li><li>- Staff qualifications for the activity, first aid,</li></ul></li></ul>



	<p>driving – Staff fitness for the activity – if relevant</p> <p><b>Safety Guidelines</b></p> <ul style="list-style-type: none"><li>• Sources to check:<ul style="list-style-type: none"><li>– local<ul style="list-style-type: none"><li>◆ institutional</li><li>◆ local education authority</li><li>◆ regional/area accredited scheme</li></ul></li><li>– national<ul style="list-style-type: none"><li>◆ government</li><li>◆ national governing bodies</li><li>◆ professional and voluntary associations</li></ul></li></ul></li></ul>
<p>Demonstrate knowledge and understanding of the legal framework surrounding off-site activities.</p>	<p><b>Legal Responsibilities</b></p> <ul style="list-style-type: none"><li>• Outline of relevant law:<ul style="list-style-type: none"><li>– statute</li><li>– common law</li><li>– European directives and regulations</li><li>– subsidiary law – Regulations/Statutory instruments</li><li>– non-statutory guidance and Codes of Practice</li></ul></li><li>• Principles of negligence:<ul style="list-style-type: none"><li>– duty of care</li><li>– higher duty of care</li><li>– “in loco parentis”</li><li>– vicarious liability</li></ul></li><li>• Contract issues:<ul style="list-style-type: none"><li>– legal commitment</li><li>– completion</li><li>– redress</li><li>– Package Tours etc Regulations 1992</li></ul></li><li>• Relevant statute:<ul style="list-style-type: none"><li>– Employers’ and employees responsibilities <b>Health and Safety at Work Act 1974</b></li><li>– Requirement for risk assessment <b>Management of Health and Safety Regulations, 1999</b></li><li>– Substantial access and criminal clearance <b>Children Act, 1989</b></li><li>– A safe environment <b>Occupiers Liability Acts, 1975 and 1984</b></li></ul></li></ul>



	<ul style="list-style-type: none"><li>- Scope and exclusions for the licensing of Centres <b>Activity Centres (Young Persons' Safety) Act, 1995</b></li><li>- <b>The Protection of Children Act, 1999</b></li></ul>
Apply knowledge and understanding of risk assessment to specified contexts.	<p><b>Risk Assessment</b></p> <ul style="list-style-type: none"><li>• The process:<ul style="list-style-type: none"><li>- review previous risk assessments where available</li><li>- identify hazards</li><li>- identify those who could be affected by hazards</li><li>- evaluate risks</li><li>- record the process</li><li>- review as required</li></ul></li><li>• Aspects to consider:<ul style="list-style-type: none"><li>- travel arrangements<ul style="list-style-type: none"><li>◆ assembly</li><li>◆ mode of transport</li><li>◆ breaks in journey</li><li>◆ levels of supervision</li><li>◆ dispersal</li></ul></li><li>- venue<ul style="list-style-type: none"><li>◆ residential base</li><li>◆ activity sites</li><li>◆ site/venue security</li><li>◆ fire precaution arrangements</li></ul></li><li>- programme<ul style="list-style-type: none"><li>◆ matching to group capability</li><li>◆ qualifications of activity staff</li><li>◆ group equipment and resources</li><li>◆ personal clothing and equipment</li><li>◆ first aid requirements</li></ul></li><li>- environmental conditions<ul style="list-style-type: none"><li>◆ weather conditions</li><li>◆ seasonal variations</li></ul></li><li>- communications<ul style="list-style-type: none"><li>◆ within the group</li><li>◆ with the venue staff</li><li>◆ with home base</li><li>◆ with emergency services</li></ul></li></ul></li><li>• Response to risk assessment:<ul style="list-style-type: none"><li>- further controls necessary</li><li>- decision to proceed/abort</li></ul></li></ul>



<p>Apply knowledge and understanding to ensure effective administration of off-site activities.</p>	<p><b>Essential Administration</b></p> <ul style="list-style-type: none"> <li>• Programme:             <ul style="list-style-type: none"> <li>- schedule the event</li> <li>- make transport arrangements</li> <li>- staffing decisions – ratios, roles and responsibilities of leader and assistants</li> <li>- codes of conduct for the group and care of the environment</li> <li>- check of personal clothing and equipment</li> </ul> </li> <li>• Certification:             <ul style="list-style-type: none"> <li>- passports</li> <li>- AALA</li> <li>- qualifications</li> <li>- driving requirements</li> </ul> </li> <li>• Consultations:             <ul style="list-style-type: none"> <li>- approvals</li> <li>- parental information</li> <li>- tourist information</li> <li>- others with knowledge of the venue/locality</li> </ul> </li> <li>• Financial administration:             <ul style="list-style-type: none"> <li>- Budgeting (anticipated costs and income)</li> <li>- Systems for monitoring incoming and outgoing monies (audit trails)</li> <li>- Systems for recording income and outcomes</li> <li>- Security systems</li> <li>- Plans for surplus income</li> </ul> </li> <li>- Preparation of balance sheet on completion</li> </ul>
<p><b>2 Managing the event</b></p>	
<p>Demonstrate the knowledge and understanding necessary for managing groups and staffing for off-site activities.</p>	<p><b>Group Management</b></p> <ul style="list-style-type: none"> <li>• briefing the staff and the group</li> <li>• achieving the objectives of the event</li> <li>• monitoring and reacting to             <ul style="list-style-type: none"> <li>- group's response to the demands of the activity</li> <li>- changing environment</li> </ul> </li> <li>• staff deployment and supervision</li> </ul>
<p>Demonstrate ability to plan for contingencies and manage incidents.</p>	<p><b>Contingency Planning</b></p> <ul style="list-style-type: none"> <li>• Set up:             <ul style="list-style-type: none"> <li>- group details left at base and taken with</li> </ul> </li> </ul>



	<p>staff</p> <ul style="list-style-type: none"><li>- emergency contact at base</li><li>- System to contact next of kin in emergencies and system cascaded to all staff</li><li>- systems for dealing with a major incident involving other agencies</li><li>- alternative plan in the event of unforeseen circumstances<ul style="list-style-type: none"><li>◆ transport breakdown</li><li>◆ delay</li><li>◆ illness (staff or members of the group)</li><li>◆ injury (including availability of first aid)</li><li>◆ poor weather conditions</li><li>◆ changes in activities</li><li>◆ next of kin unavailable (during/after event)</li></ul></li></ul> <p><b>Incident Management</b></p> <ul style="list-style-type: none"><li>• minor (dealt with on site):<ul style="list-style-type: none"><li>- dealing with the incident</li><li>- managing the whole group</li><li>- assessing the situation</li><li>- continuing the activity or returning to base</li></ul></li><li>• major (involving other agencies):<ul style="list-style-type: none"><li>- immediate action at the scene</li><li>- implement procedures governing contact with:<ul style="list-style-type: none"><li>◆ emergency services</li><li>◆ organisation/centre</li><li>◆ immediate family</li><li>◆ media</li></ul></li><li>- dealing with the incident</li><li>- managing the whole group – post incident arrangements</li><li>- assessing the situation</li><li>- continuing the activity or returning to base</li><li>- record essential information</li><li>- returning the group to base or home</li><li>- post incident care of the group</li></ul></li></ul>
<b>3 Evaluating the event</b>	
Demonstrate the ability to carry out post-event evaluation.	<p><b>Why?</b></p> <ul style="list-style-type: none"><li>• Integral part of risk management</li><li>• Achievement of objectives</li><li>• Reflect on the effectiveness of the</li></ul>



	<p>planning</p> <ul style="list-style-type: none"><li>• To improve on the organisation of future events</li><li>• Review 'near misses' and other safety issues</li></ul> <p><b>What?</b></p> <ul style="list-style-type: none"><li>• How well the objectives of the activity were met</li><li>• Initial planning (including staffing and safety planning)</li><li>• Meeting legal requirements</li><li>• Effectiveness of the risk assessment</li><li>• Administration (including programme and implementation)</li><li>• Effectiveness of contingency plan</li><li>• Group management</li><li>• Incidents and 'near misses'</li></ul> <p><b>How?</b></p> <ul style="list-style-type: none"><li>• Debrief group, staff and others involved</li><li>• Reflection by group leader</li><li>• Report</li></ul> <p><b>When?</b></p> <ul style="list-style-type: none"><li>• Before leaving the venue</li><li>• Soon after arriving at base</li></ul> <p><b>For whom?</b></p> <ul style="list-style-type: none"><li>• Parents</li><li>• Organisation management</li><li>• Group leader</li></ul>
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**Geography Outdoors:**

*the centre supporting field research, exploration and outdoor learning*

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