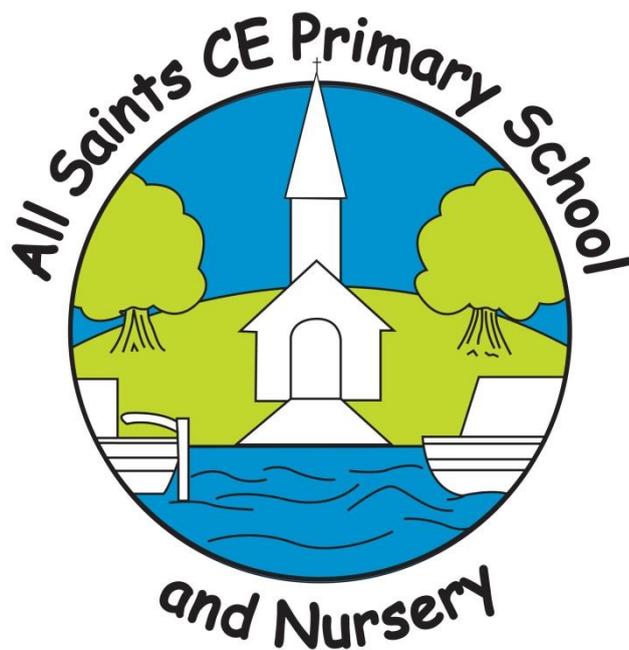


Learning Outside the Classroom (LOtC) and Offsite Educational Visits Policy.



*'Learning for life,
building a firm foundation'*

Reviewed: June 2016

Headteacher: Sally Kaminski-Gaze

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Policy for Learning Outside the Classroom (LOtC) and Offsite Educational Visits

This Corporate policy details the specific responsibilities for the management and control of learning outside the classroom (LOtC) and Offsite Educational Visits within Warwickshire County Council.

This policy is for schools where Warwickshire County Council (WCC) is the employer (community & voluntary controlled schools, community special schools & maintained nursery schools) and is applicable to other areas and activities of WCC.

Non-maintained schools and other educational settings may wish to use this policy as guidance or to adopt it within their own organisation.

Current copies of this document along with additional guidance, forms, etc. are available at www.warwickshire.gov.uk/outdooreducationteachers

Warwickshire County Council Commitment

- To comply with the relevant legislation and Health and Safety Executive (HSE) guidance for school trips and outdoor learning activities.
- To comply with and adopt current National Guidance for outdoor education.
- To comply with relevant WCC Policies such as the Health and Safety Policy, School Health and Safety Standards, etc.
- To have competent responsible persons as detailed within this policy.
- To ensure our risk assessment / management process is sensible and proportionate and focuses on the real risks as directed by the HSE.

Provision of National Guidance

Warwickshire County Council has formally adopted the Outdoor Education Advisers' Panel (OEAP) [National Guidance](#) as an integral part of Warwickshire's 'Learning outside the classroom (LOtC) and Offsite Educational Visits (OEV) policy'. This ensures that our WCC arrangements are working in accordance with nationally recognised standards and are kept up-to-date.

This policy therefore outlines the main requirements for LOtC and OEV and gives links to appropriate sections of the National Guidance if additional information may be required.

The law requires that employees must cooperate with their employer and follow any health & safety arrangements 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 Warwickshire's guidance, systems and processes for supporting LOtC activities, they should produce a policy statement that makes this clear.

Where a LOtC / OEV activity is commissioned from an external body, the person commissioning should ensure that the external 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.

Status, Remit and Rationale

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 children and young people aged 0-19 undertaking experiences beyond the boundary of their normal operational base.
- Direct supervision of children and young people aged 0-19 undertaking experiences that fall within the remit of Learning Outside the Classroom.
- Facilitating experiences for children and young people aged 0-19 undertaking experiences beyond the boundary of their normal operational base.
- Deploying staff who will supervise or facilitate experiences of or for children and young people aged 0-19 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, Remit and Rationale' 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 & Duty of Care', part of the [Legal framework & employer systems](#) folder.

Role-specific requirements and recommendations

The National Guidance sets out 'Requirements and recommendations for employers', part of the [Legal framework & employer systems](#) folder, 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, titled Educational Visits Officer within WCC
- Advisers (other than an OEA), including Health & Safety Officer
- 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, part of the [Legal framework and employer systems](#) folder, including:

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

See National Guidance: [Legal framework and employer systems](#) for information on individual roles.

Ensuring understanding of basic requirements

As an employer, Warwickshire 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 Warwickshire is the adopted [National Guidance](#) produced by OEAP.

The relevant **training** courses in Warwickshire are:

- **Educational Visit Coordinator (EVC)** training – all Warwickshire Children's Services establishments are required to have a current Warwickshire-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.

Any updates to the policy, etc. that EVCs or visit leaders should be aware of will be available at www.warwickshire.gov/outdooreducationteachers .

When staff members require clarification or further help and advice on visits, they should initially contact their EVC.

For further WCC advice and guidance on trips, contact the WCC Educational Visits Officer:

 01926 742494
Email sherandent@warwickshire.gov.uk

For further WCC health and safety advice and guidance, community and voluntary controlled schools can contact the WCC Corporate Health, Safety & Wellbeing Service:

 01926 476803
Email HealthandSafety@warwickshire.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 children and 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.

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

Refer to the National Guidance document: 'Good Practice for EVC or Visit Leader', found in the [Good-practice](#) folder.

Risk management

The Management of Health & Safety at Work Regulations requires 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, this could also remove many of the benefits associated with the activity and hence 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 children and young people are exposed to well-managed risks so that they

learn how to manage risk for themselves.

Refer also to the Health and Safety Executive (HSE): [‘School trips and outdoor learning activities: Tackling the health and safety myths’](#).

Risk assessments should be recorded and identify appropriate controls to minimise the risk of serious harm to students or staff. This is the same risk assessment process that we undertake for assessing the risk(s) with other school activities (refer to and comply with the WCC Risk Assessment Policy). It is, therefore, necessary to undertake a risk assessment for all activities and visits, however, you will need to decide whether a ‘generic’ risk assessment is sufficient or whether a ‘visit-specific’ assessment is required. Refer to National Guidance documents:

[Risk Management - an overview](#), [Risk Management - some practical advice to leaders](#)

[Risk Management - what to record and how](#).

Please note, the WCC risk assessment template form should be used to assist you in this process:

[Risk assessment template form](#)

Planning

Planning should reflect your school / team / service procedures, employer’s requirements, legal requirements and good practice. You should ensure that:

- All staff (including any adult volunteer helpers) and the children and 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. Refer to National Guidance document: [Consent](#)
- Proportionate assurances have been obtained from any providers (making full use of national schemes that verify 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 on-going 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](#)

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 children and 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](#)

Notification of activities and visits

WCC delegates the responsibility for formal approval of all offsite educational visits and LOtC activity to School/Team/Service (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** WCC's Educational Visit Officer in advance of any higher risk visits and activities which:

- involve an overseas visit
- involve a residential or overnight stay (at home or abroad)
- involve the provision of an adventurous activity

The notification procedure requires an 'Offsite Activities Notification Form' (OSA1) to be emailed to sherandent@warwickshire.gov.uk

Notification forms are available from: www.warwickshire.gov.uk/outdooreducationteachers

See also **Duke of Edinburgh's Award** section below.

Monitoring

Employers must ensure that any systems they put in place are effectively monitored. The WCC Educational Visits Advisor will carry out a sample of monitoring visits in schools where WCC is the employer to check offsite visit arrangements in place; however, the main monitoring role within 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' found in the folder: [Legal frameworks and employer](#)

Emergency planning and critical incident support

A critical incident is an incident where any member of a group undertaking a LOtC / OEV activity:

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

The County Council's Emergency Plan is in place to support schools / services in the event of emergencies and critical incidents. Specifically for Schools, reference should be made to, and compliance with, The [Emergency Advice and Support for Educational Establishments \(EASEE\)](#) document that has been developed by the CSW Resilience Team.

Refer to National Guidance document: [Offsite visits emergencies - an establishment's role](#)

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 children and young people to be supervised
- The ability of the children and 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 the transport activity. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it; therefore establishments **must** follow any relevant WCC policies and guidance - namely, the [Driving at Work Policy](#) and [Transporting Children, Young People and Adults Safely Guidance](#) document. All national and local regulatory requirements **must** be followed.

A number of factors should be considered as part of your driving/transport risk assessment; including, but not limited to, – driver competence, suitability/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 children and 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 children and 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 children and 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 School Activities, found in the [Visit Leader](#) folder.

Insurance for off-site visits

Where the school subscribes to the WES Schools Insurance Service the following insurances apply to offsite visits to the same extent as they do on school premises:

- Employers' liability. Indemnifies the school in respect of claims for compensation for bodily injury suffered by any employee. For the purposes of this insurance, persons acting in a voluntary capacity as assistant supervisors are classed as employees.
- Public liability. Indemnifies the school and employees in respect of claims for compensation for bodily injury and third party property damage.
- Personal accident. Limited cover for teachers and volunteers.

Cover is not provided for the following risks, therefore the school would need to procure this insurance independently:

- Personal accident for pupils. Provides specific benefits in the event of an accident and should not be confused with public liability insurance, which indemnifies the school should it be legally liable for damages.
- Loss of or damage to personal effects.
- Cancellation or curtailment. Should be considered where significant non-refundable deposits or costs are incurred if the trip is cancelled, or a pupil cannot travel.
- Medical expenses and repatriation costs. Should be considered essential for non-UK trips.
- Personal liability.

Visit and Activity Leaders should contact the Council's Insurance Team (tel: 01926 418160 email: rogerlinney@warwickshire.gov.uk) 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, Found in the [Outdoor-education-adviser](#) folder.

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 children and 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.

<http://media.education.gov.uk/assets/files/doc/d/dfE%20consent%20form.doc>

Refer to National Guidance document: Parental Consent found in the [Outdoor-education-adviser](#) folder.

Consent for medical treatment

Parents should give medical consent, providing authority for their child to receive emergency treatment, including administration of an anaesthetic or blood transfusion. The DfE consent form includes medical consent:

<http://media.education.gov.uk/assets/files/doc/d/dfE%20consent%20form.doc>

Refer to the National Guidance Document: Medication, found in the [Outdoor-education-adviser](#) folder.

Safeguarding

It is the responsibility of the Visit Leader, Group Leaders, and all other staff and adults involved, to safeguard and promote the welfare of children and young people during outdoor learning, off-site visits and learning outside the classroom.

Refer to the National Guidance document: Safeguarding, found in the [Outdoor-education-adviser](#) folder.

DBS checks

Employees who work **frequently** or **intensively** with, or have **regular access** to children and young people or vulnerable adults, must undergo an enhanced DBS check as part of their recruitment process. For the purposes of this policy:

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

However, it must be clearly understood that a DBS check (or other vetting procedure) in itself is no guarantee as to the suitability of an adult to work with any given group of young or vulnerable people.

If you are planning to place an adult, within a situation of professional trust (where children and young people could be vulnerable to physical or mental exploitation or grooming), you should always carry out a common sense risk-benefit assessment.

Refer to National Guidance document: Vetting and Disclosure and Barring Service (DBS) Checks

found in the [Employer](#) folder.

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 children and 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 children and 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', found in the [oeapng.info](#) folder.

Duke of Edinburgh's Award

Warwickshire County Council is the licensed DofE Operating Authority for groups registered in Warwickshire to deliver DofE programmes to children and 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 Warwickshire 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 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 Warwickshire 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 Warwickshire Council's DofE Manager and approval must be granted before the venture takes place to ensure the activity qualifies as a DofE activity.

 01926 742502

Address: Saltisford Office Park, Ansell Way, Warwick, CV34 4UL

'Expedition Notification' and 'Expedition Notification Group Details' forms can be found at www.warwickshire.gov.uk/dofe

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 children and 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 children and young people, and has been able to demonstrate compliance with nationally accepted standards of good practice in the delivery of adventure activities to children and 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 Warwickshire'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, find in the [Specialist-activities-and-visits](#) folder.

The value and evaluation of LOtC

The Ofsted report 'Learning Outside the Classroom – How Far Should You Go?' (2008) <http://ofstednews.ofsted.gov.uk/article/382> 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 of LOtC meeting Ofsted expectations, find in the [Policies-planning-and-evaluation](#) folder that will be useful for head teachers, managers, EVCs and visit leaders.