



# Policy & Procedures for the Management of Off-site Visits and Related Activities

2018

*The current versions of this policy and the HET Guidance for Off-site Visits and Related Activities, may be downloaded from the HET Guidance section of the HET EVOLVE, Resources document area.*

*Where these documents and any other HET document, form or checklist referenced in them, are stored elsewhere either in electronic or hard-copy formats, it may not be possible to ensure that they will remain the most up to date versions. It is therefore recommended that, when required, all HET documents are referenced and/or downloaded directly from the HET EVOLVE Resources area.*

Version 1.1: April 2018

## Amendments to version 1.0: March 2018

### Version 1.1: April 2018

1. 'Definitive version' warning added to cover page:
2. Appendix D updated and amended to cross reference the EVOLVE visit form;

*Safely managed off-site visits with a clear purpose are an indispensable part of a broad and balanced curriculum. They are an opportunity to extend young people's learning and enrich their appreciation and understanding of themselves, others and the world around them. They can be the catalyst for improved academic performance, a lifetime interest or in some cases professional fulfilment. They are to be encouraged.*

*This policy has been created with reference to HET's Guidance for Off-site Visits and Related Activities (2018), OEAP National Guidance (2017) and DfE Health and Safety: advice on legal duties and powers (Feb. 2014).*

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## 1. Scope and Remit

1.1. This policy and associated guidance (Section 2) applies to employees, contractors and volunteers whose work involves any one of the following, regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods:

- 1.1.1. direct supervision of young people undertaking experiences beyond the boundary of their normal operational base;
- 1.1.2. facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base;
- 1.1.3. deploying staff who will supervise or facilitate experiences of, or for, young people undertaking experiences beyond the boundary of their normal operational base;

1.2. This policy and associated guidance does not incorporate the following:

- 1.2.1. Where an academy operates on more than one site, the movement of staff and young people between sites;
- 1.2.2. Physical Education activities, led by *Humber Education Trust* employees, that do not fall within the scope of Adventurous Activities, as defined in the *Employer Guidance* (Section 21). The activity supervision should be that required or recommended by specialist PE guidance provided by the *Association for Physical Education (AfPE)*. The journey to and from the venue, any Adventurous Activities and activities provided by third parties are covered by this policy and associated guidance.

1.3. As the employer, *Humber Education Trust (HET)* will provide:

- 1.3.1. appropriate guidance relating to off-site visits and activities;
- 1.3.2. access to training courses to support the guidance to ensure that it is understood;
- 1.3.3. suitable systems and processes to ensure that those trained are kept updated;
- 1.3.4. access to advice, support and further training from appointed Advisers, who have expertise and professional understanding of the guidance, the training and expectations set by current good practice.

1.4. The following terms may be used in this policy and associated guidance:

- 1.4.1. **Off-site visits and activities** will include the following that take place beyond the boundaries of an establishment site: educational visits; Learning Outside the Classroom (LOtC); outdoor learning.
- 1.4.2. An **Educational Visits Co-ordinator (EVC)** is an appropriately competent *HET* employee appointed to ensure that all off-site activities meet the requirements of their employer's policy and

guidance, as well as the requirements of establishment policy and procedures.

- 1.4.3. A **Leader** is any adult with supervisory responsibilities for young people on an off-site visit;
- 1.4.4. A **Visit Leader** is an accountable person (employed, contracted or a volunteer), engaged through a thorough recruitment process, with overall responsibility for an off-site visit;
- 1.4.5. **Establishment** is an *HET* academy.

See also OEAP National Guidance:      **Section 1c: Status, Remit and Rationale**  
  **Section 3.4: Roles & Responsibilities**

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## 2. Provision of Guidance by the Employer

- 2.1. *HET Guidance for Off-site Visits and Related Activities* (referred to as *Employer Guidance*) states the requirements of the employer. Where guidance is a recommendation rather than a requirement, this will be clearly stated as such.
- 2.2. *HET* recognises *The Outdoor Education Advisers' Panel: Guidance for the Management of Outdoor Learning, Off-site visits and Learning Outside the Classroom* (referred to as *National Guidance*), as the definitive source of best-practice guidance.
- 2.3. *HET* employees, volunteers and contractors must follow the requirements of this policy, *Employer Guidance* (2.1), *OEAP National Guidance* (2.2), and any relevant establishment policies.
- 2.4. The definitive versions of this policy and *Employer Guidance* (2.1) may be found on the 'HET Policy & Guidance' page in the Resources area of the EVOLVE website. The most up to date version of the *OEAP National Guidance* is available at [www.oeapng.info](http://www.oeapng.info) .

For an explanation of legal expectations, all users of this policy are recommended to read the *OEAP National Guidance* document: **Section 3.2a: Underpinning Legal Framework and Duty of Care 3.2a**.

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## 3. HET EVOLVE

- 3.1 EVOLVE is a web-based system that provides the following:
  - 3.1.1 An online Notification and Approval system for visits;
  - 3.1.2 Definitive versions of this policy and *Employer Guidance*;
  - 3.1.3 Definitive versions of *HET* forms and documents, essential for the visit process;
  - 3.1.4 Definitive versions of establishment forms and documents, essential for the visit process;

- 3.1.5 Best-practice forms and documents that may be adapted by establishments to support the visit process;
  - 3.1.6 Links to important national documents referenced in the *Employer Guidance*;
  - 3.1.7 Search and Reporting facilities.
- 3.2 All staff involved in the visit process should be given a personal EVOLVE account to enable them to access: key policies; employer and national guidance; good-practice forms and documents; the notification and approval process for visits;

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#### 4. Role-specific Requirements

- 4.1. Each establishment is required to have an Educational Visits Co-ordinator (EVC) in place who, through experience and training, is appropriately competent to fulfil that role in their establishment. Establishments must ensure that the EVC is clearly identified and known to any member of staff with any involvement with off-site visit and related activities.
- 4.2. The roles and responsibilities of the key stakeholders in the visit process: Governing Body; Headteacher; EVC; Visit Leader; Leader; Volunteer; those in a position of Parental Authority, are outlined in Appendix A of this policy.
- 4.3. Roles and responsibilities reflect those detailed in *OEAP National Guidance: Section 3.1b Requirements and Recommendations for Establishments*.
- 4.4. Every off-site visit must have a designated Visit Leader. The Visit Leaders must be a Leader who is accompanying the visit. Joint Visit Leaders are not permitted, though, Deputy Visit Leader(s) may be appointed as required.
- 4.5. All visits must be led and supervised by appropriately competent adults. Staffing levels must be determined through the risk management process (see Section 8 of this policy).
- 4.6. Establishments are required to ensure that all Visit Leaders and Leaders have been assessed as competent and confident to undertake responsibilities they have been assigned in line with *OEAP National Guidance*.

See also OEAP National Guidance: **Section 3.4: Roles & Responsibilities**

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#### 5. Advice and Support

- 5.1. The EVOLVE Resources area contains links and downloadable documents that provide a comprehensive range of information from key sources. Staff referencing documentation or information from other sources e.g. hard copies and electronic files, should ensure that they are the most up to date versions by reference to the definitive versions on the EVOLVE website.
- 5.2. For the purposes of day-to-day updating of information, EVCs and Visit/Activity Leaders are directed to postings in the EVOLVE Resources area or Home page;

- 5.3. Where an employee experiences problems finding specific material, or requires clarification or further help and guidance, they must contact their establishment's Educational Visits Coordinator (EVC), in the first instance.
- 5.4. If the EVC is unable to resolve a problem, they should contact the HET Off-site Visits Adviser.
- 5.5. HET Off-site Visits Adviser is:

Ken Hutson  
Offsite Education Limited  
[kh@offsite-education.co.uk](mailto:kh@offsite-education.co.uk)  
01482 632529 / 07748 763368

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## **6. Notification and Approval of Off-site Visits & Related Activities**

- 6.1. The HET procedure for the notification and approval of off-site visits and related activities may be found in Appendix B. of this policy.
- 6.2. Establishments are required to notify and seek approval from *HET* for the following types of visits, in accordance with the procedure in 6.1: those extending beyond the UK (Overseas); those involving one or more overnight stays (Residential); those involving Adventurous Activities as defined in Section 21 of the *Employer Guidance*.
- 6.3. *HET* will require at least 15 working days notice for visits described in 6.2. For overseas visits and those involving complex arrangements, staff must be prepared to discuss such visits with the Off-site Visits Adviser well in advance, possibly 12 months before the departure date and before a financial or contractual commitment is made with any third party provider.
- 6.4. Approval of all other types of visits and activities is delegated to the establishment Headteacher.
- 6.5. The Establishment is required to record, notify and authorise visits and activities described in 6.4, in accordance with the procedure in 6.1.
- 6.6. In order to meet the requirements in 6.3, all staff organising visits must be aware that visits requiring approval by *HET* will need to be scrutinised by the establishment EVC and Headteacher prior to submission to *HET*. It is the Visit Leader's responsibility to ensure that the completed EVOLVE form is submitted, and arrangements for the visit are in place, well before *HET's* deadline.
- 6.7. For visits where approval is delegated to the establishment Headteacher, each establishment may identify a Local Learning Area (see Appendix E). *Ad hoc* visits that take place within the Local Learning Area during the academy day, are not required to be notified and approved using EVOLVE. For all regular visits (e.g. swimming lessons), any visit that includes an Adventurous Activity and all visits taking place outside the Local Learning Area, Visit Leaders must submit EVOLVE visit forms in advance of the visit to enable time for scrutiny and any further issues to be resolved (see Appendix B of this policy).

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## 7. Monitoring

- 7.1. The responsibility for monitoring the implementation of this policy and associated *Employer Guidance* is delegated to establishments and managed by the EVC.
- 7.2. Monitoring should be carried out through systems put in place by the establishment Headteacher and EVC as outlined below:
  - 7.2.1. The EVC will monitor all visits through scrutiny of the visit forms;
  - 7.2.2. Depending on the nature of the visit and the experience of the EVC, the Headteacher or a delegated senior manager will be expected to provide additional scrutiny of visit forms and arrangements for the visit;
  - 7.2.3. When necessary, the EVC will require further information and action from the Visit Leader and/or those responsible for organising the visit until the EVC is satisfied that the visit meets the requirements of this policy and *Employer Guidance*;
  - 7.2.4. When necessary the EVC will inform the Headteacher/senior manager of any concerns, in relation to the organisation of the visit, that may have safety implications or may significantly reduce the quality of experience for those taking part;
  - 7.2.5. Field monitoring of visits will take place on a sample basis by the EVC/Headteacher/senior manager and the results of such monitoring will be recorded and made known to the Headteacher/EVC & Visit Leader and any other Leaders, as appropriate;
  - 7.2.6. For some visits or aspect(s) of a visit, it may be necessary to seek advice from the HET Off-site Visits Adviser as part of the monitoring process;
- 7.3. *HET* will monitor selected visits and activities.

See also OEAP National Guidance: **Section 3.2b Monitoring**

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## 8. Risk Management

- 8.1. Risk is expected to be reduced to an acceptable or tolerable level, but not necessarily eliminated. Planning should achieve a rational balance between potential adverse risks and the intended benefits and outcomes of the activity.
- 8.2. Risk management tasks are delegated to establishments and are normally carried out by the Visit Leader (and Leaders) with the support of EVCs as required.
- 8.3. The establishments will arrange training for staff in risk management, as required. See Section 9.
- 8.4. Safe Working Procedures are available for some areas and activities (e.g. coach travel) to support the Visit Leader with visit planning and the risk management process. The most up to date versions are available from the EVOLVE Resources area. Safe Working Procedures documents should not be attached to EVOLVE visit forms.

- 8.5. Some visits and activities will require consideration of additional hazards and their associated risk that are specific to the visit (e.g. comfort breaks/service area stops on longer coach journeys). They will usually take into account the nature and needs of the young people participating (e.g. special and medical needs), experience and competency of the Leaders, the venue, environment and the activities being undertaken. They should be recorded on an *Event Specific Notes Form* which should be attached to the EVOLVE visit form or completed on the EVOLVE visit form, as part of the approval procedure.
- 8.6. It may be that for some visits, low risk and those within the Local Learning Area, there are no significant additional hazards and Safe Working Procedures and/or notes in the Visit Leader's lesson plan will be sufficient.
- 8.7. A flowchart (Risk Management) outlining the risk management process is available from the 'HET Forms & Docs' page of the EVOLVE Resources area.
- 8.8. Visit Leaders should involve other Leaders (including volunteers) in the risk management process. They must be aware of the establishment's Safe Working Procedures and additional controls recorded on the *Event Specific Notes* form.
- 8.9. Where appropriate and where possible, the young people participating in the visit should be involved in the planning and risk management. This will increase their risk awareness and enable them to have a greater ownership of the event.

See also OEAP National Guidance: **Section 4.3c Risk Management**

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## **9. Parental Consent and Information**

- 9.1. For visits taking place entirely during academy hours, parents/carers will be given information about the visits and any additional requirements such as voluntary contributions; and be asked to give written consent as well as providing an emergency telephone contact number
- 9.2. For residential and overseas visits and those involving Adventurous Activities, meetings with parents will be arranged and visit-specific written consent will be required together with up to date information on participants (e.g. current medical issues, emergency contact details);
- 9.3. For visits in the academy's local area, parents will be required to sign a one-off consent form at their child's entry to the academy or at the beginning of the Autumn term for pupils currently on-roll in the academy.
- 9.4. Expectations of behaviour and codes of conduct will be explained to parents. This will include the need to meet the cost of and make arrangements for, collecting their children in certain circumstances.

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## **10. Critical Incident Management and Emergency Procedures**

- 10.1. Establishments have procedures in place to deal with incidents occurring on visits as outlined below (see also *Employer Guidance* Section 27):

- 10.1.1. For all visits, the Visit Leader must carry and be familiar with, the contents of the establishment Emergency Card (Visit Leader) which outlines actions they need to take and gives details of those who may need to be contacted;
- 10.1.2. There must be a nominated Emergency Home Contact for all visits, who has access to all the visit details including medical and next-of-kin information for the Leaders as well as the young people. Copies of completed consent forms should not be attached to EVOLVE visit forms;
- 10.1.3. For visits that take place entirely during the establishment day, the Emergency Home Contact is likely to be the establishment office;
- 10.1.4. For visits that take place out of establishment hours or extend beyond the school day, this will be an appropriately competent, named person (e.g. EVC, Headteacher, Office Manager, Senior Manager) who is available at all times (24/7) for the duration of the visit. For some visits (extended residentials) it may be necessary for more than one contact to be nominated in order to ensure 24/7 support;
- 10.1.5. Emergency Home Contacts must be familiar with and have access to an establishment Emergency Card (Home Contacts) which outlines the action that needs to be taken in an emergency and gives details of others that may need to be contacted;
- 10.1.6. Emergency Home Contacts should have access to and be familiar with EVOLVE so that they can view visit forms if necessary. This will require Read Only Account access as a minimum;
- 10.1.7. The EVC will test procedures from time to time (e.g. availability of Emergency Home Contact(s) to respond to an emergency call).
- 10.2. An incident where events are beyond the normal coping mechanisms and experience of the Visit Leaders and accompanying Leaders (Critical Incident) will require immediate support from the establishment Emergency Contacts and implementation of the establishment Emergency Procedures. All staff involved in visits must be familiar with these procedures which should be tested annually.
- 10.3. Where an establishment's emergency response capability is unable to cope; where an incident involves serious injury or fatality or where it is likely to attract media attention, assistance should be sought from *Hull City Council* using the Hull City Council Emergency Contact (24 hour number) from the 'Contacts' page of the *Employer Guidance*.
- 10.4. Establishment managers must ensure they meet the requirements of the RIDDOR regulations and good practice.
- 10.5. Please see Critical Incident Plan

See also OEAP National Guidance:

***Section 4.1b Emergency Planning, The Establishment's Role;  
Section 4.1c Emergency Procedures for Visit Leaders***

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## 11. Training

- 11.1. *HET* recognises, requires and recommends, as appropriate, the following basic training courses for visit stakeholders:
- 11.1.1. Educational Visits Co-ordinator(EVC) Training;
    - 11.1.1.1. All EVCs should have undergone training (min. 6 hours) from an *HET* approved provider which includes the OEAP core messages for EVCs as a minimum;
    - 11.1.1.2. Where the training was not provided by *HET*, full details of the course completed must be presented to *HET* Off-site Visits Adviser for approval and record-keeping purposes;
    - 11.1.1.3. Where the training will not be provided by *HET*, the course must be authorised in advance by the *HET* Off-site Visits Adviser.
  - 11.1.2. EVC Update Training;
    - 11.1.2.1. Update training (min. 3 hours) should be completed by EVCs at least every 3 years following full EVC training (9.1.1);
    - 11.1.2.2. Update Training is subject to the provisions outlined in 9.1.1.1, 9.1.1.2 and 9.1.1.3.
    - 11.1.2.3. EVCs will also be kept up to date on an *ad hoc* basis by *the* Off-site Visits Adviser via mailings and/or meetings.
  - 11.1.3. Leader Training;
    - 11.1.3.1. Leaders are required to be appropriately competent to fulfil their responsibilities. This will require them to be current in their knowledge of good practice and be able to apply it when planning and leading visits.
    - 11.1.3.2. Leaders and particularly Visit Leaders are recommended to complete Leader Training (min. 6 hours), from a *HET* approved provider, which includes the OEAP core messages for those leading off-site visits and activities.
    - 11.1.3.3. Leader Training is subject to the provisions outlined in 9.1.1.2 and 5.1.1.3.
    - 11.1.3.4. The following training courses are also recognised for Visit Leaders in certain visit contexts:
      - Off-Site Safety Management, OSSM (Royal Geographical Society, RGS) – recommended.
      - Snowsports Course Organisers award, SCO (Snowsport England) – required (see Employer Guidance section 25)
      - Overseas Expeditions and Fieldwork Training (RGS) – recommended.
- 11.2. Identification of training needs and provision of appropriate training courses is delegated to establishments;
- 11.3. Further advice and information relating to training for off-site visit stakeholders may be obtained from *HET* Off-site Visits Adviser.

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## 12. Insurance

- 12.1. Visit participants are automatically insured for Personal Accident and Travel insurance through the establishments insurance for visits within the UK ;
- 12.2. Employer's and public liability policies are fully operative to indemnify the establishment in the event of personal injury claim being brought against the establishment;
- 12.3. The establishment Visit Leaders should be aware of the limitations and exclusions stated in the policy and should arrange additional cover if necessary;
- 12.4. The establishment should not purchase insurance cover from third parties for activities and events that are already covered by the *HET* policy in 12.1;
- 12.5. Further information regarding insurance can be obtained from the establishment Business Manager.

See also OEAP National Guidance: **Section 4.4c Insurance**

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## 13. Finance

- 13.1 An establishment may ask parents/carers for a voluntary contribution towards the cost of a visit;
- 13.2 If a visit cannot be funded without voluntary contributions, this should be made clear to parents/carers;
- 13.3 Parents/carers must be aware that there is no obligation to make any contribution towards the cost of a visit that is taking place predominantly during the academy day(s);
- 13.4 A pupil will not be excluded from a visit simply because their parents/carers are unable or unwilling to pay;
- 13.5 If insufficient voluntary contributions are raised, or an establishment cannot fund the visit from another source, then it will be cancelled.

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## 14. Forms and Checklists

The forms, checklists and other HET documents referred to in this policy and the Employer Guidance are listed in Appendix C of this policy.

HET Safe Working Procedures are listed in Appendix D of this policy and are available in the EVOLVE Resources area, Establishment Document Library

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# Appendix A

## Roles and Responsibilities of Key Stakeholders

### 1. The Governing Body

The Governing Body will:

- 1.1 have oversight of the visits process in accordance with the employer's policy and guidance, but will not be required to authorise individual visits;
- 1.2 delegate authorisation/approval of all visits to the Headteacher;
- 1.3 ensure that training is available, where appropriate, to support this policy and the employer's policy and guidance;
- 1.4 ensure that an appropriately competent EVC is in place who is adequately supported in their role;
- 1.5 Arrange for individual members of the Governing Body to be given Read Only EVOLVE accounts in order to fulfil their role with respect to visits and have access to up to date policy, guidance and visits (past, present and future).

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### 2. The Headteacher

*(Where the Headteacher is **NOT** the EVC, they need to be very clear as to where (and the extent to which) they have delegated functions within their responsibilities to the designated EVC. This should be specifically stated in this policy.)*

The Headteacher will:

- 2.1. ensure that all staff and volunteers involved in the visit process are appropriately competent to carry out responsibilities allocated to them and have received training as appropriate;
- 2.2. ensure that all visits comply with the establishment policy and employer's policy and guidance;
- 2.3. be responsible for approving all visits in accordance with the employer's approval procedure (Appendix B.). The Headteacher may delegate approval to a named senior manager but retains responsibility for approval;
- 2.4. ensure that all visits are approved prior to departure in line with the employer's approval procedure;
- 2.5. ensure that an appropriately competent EVC has been designated and supported in accordance with this policy and the employer's policy and guidance;
- 2.6. be clear about their role when taking part in the visit as a Leader and should follow the instructions of the designated Visit Leader, who will have sole, over-all charge of the visit;
- 2.7. ensure that suitable child protection procedures are in place, including vetting at an appropriate level of all voluntary helpers;
- 2.8. ensure that they have assigned sufficient time for staff to organise visits properly;
- 2.9. support an apprenticeship /succession planning culture to ensure sustainable visits and the development of competent Visit Leaders and EVCs;
- 2.10. support the EVC in ensuring that visits are effectively supervised with an appropriate level of staffing;

- 2.11. support the EVC in ensuring that visit information has been shared with parents and that consent has been sought where necessary;
- 2.12. ensure that they promote a staffing culture that encourages gaining formal accreditations in first aid, so enabling a visit culture that makes access to first aid more readily available;
- 2.13. ensure that suitable transport arrangements are in place and meet any regulatory requirements;
- 2.14. ensure that insurance arrangements are appropriate and, wherever possible, are set up to reduce the burden of bureaucracy for all concerned;
- 2.15. ensure that details related to the visit and participants (including staff) are accessible to a designated 24/7 emergency contact(s) at all times in case of a serious incident;
- 2.16. ensure that there are contingency plans in place should the visit plan be significantly changed or cancelled (Plan B);
- 2.17. ensure that arrangements are in place for the Governing Body to be informed of such visits as are required by the establishment visit policy;
- 2.18. be aware of the need to obtain best value. Appropriate consideration must be given to financial management, choice of contractors, and contractual relationships;
- 2.19. ensure that the establishment policy includes appropriate emergency procedures in case of a major incident;
- 2.20. ensure that the establishment policy includes a procedure to ensure that parents are appropriately informed in the event of a serious incident;
- 2.21. ensure that serious incidents are reported to the employer.

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### 3. The Educational Visits Co-ordinator (EVC)

(see also employer's guidance)

- 3.1. A named Educational Visits Coordinator (EVC) will be appointed who has received appropriate training and is competent to fulfil the role. **The EVC may be assisted by a person who fulfils an administrative function only.**

The EVC will, in accordance with establishment policy and employer's policy and guidance:

- 3.2. be familiar with and have a good understanding of the contents of the establishment policy and the employer's guidance and comply with their provisions;
- 3.3. manage the school EVOLVE account and provide access to and training for staff and Governors on the system;
- 3.4. identify and record, with the minimum paperwork and using EVOLVE where appropriate, qualifications, training, development, induction and apprenticeship arrangements for all Visit Leaders and Leaders (employed staff and volunteers);
- 3.5. monitor visit planning, risk management and evaluation of all visits. This will include sample monitoring 'in the field';
- 3.6. advise the Headteacher in relation to Visit Leader/Leader competence and training requirements for all staff involved in the visits process;
- 3.7. ensure sufficient, appropriately competent and vetted staff and volunteers accompanying the visit in accordance with the risk management arrangements and employer's guidance;

- 3.8. ensure sensible risk management is in place before, during and after the visit and recorded where appropriate. This will include arrangements for: risk assessment; vetting Leaders and volunteers; parental information and consent; emergency contacts; contingency arrangements; medical and First Aid issues; emergency procedures;
- 3.9. have access to update training opportunities and a technical adviser (e.g. HET Off-site Visits Adviser) either employed by or contracted to the employer.
- 3.10. ensure that arrangements have been made for the medical needs and special educational needs of all the young people and also address any inclusion issues;
- 3.11. ensure that EVC functions are delegated as and where required;
- 3.12. ensure that establishment policy identifies the types of visit that require a preliminary visit and the processes required when a preliminary visit is not reasonably practicable;
- 3.13. ensure that establishment policy formally adopts a set format for recording written risk assessments or their equivalent. Such RAs should be proportional, suitable and sufficient and based on the 'Principles of Sensible Risk Management';
- 3.14. ensure that, where the activity involves a third party provider, appropriate assurances have been sought. Specifically note those national schemes that make seeking provider assurances unnecessary e.g. LOtC Quality Badge, AALS licence, Adventuremark, or a clear management Statement of Competence;
- 3.15. ensure that all visits are evaluated with regard to best value, teaching and learning, quality experiences, and address issues raised by any serious incident that might inform the operation of future activities/visits;

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#### **4. The Visit Leader**

The Visit Leader will, in accordance with establishment policy and employer's policy and guidance:

- 4.1. be an accountable person (employed, contracted or a volunteer), engaged through a thorough recruitment process;
- 4.2. ensure Best Value principles are used when selecting providers and make appropriate checks in accordance with establishment policy and guidance. Visit Leaders should NOT normally request copies of risk assessments from providers;
- 4.3. undertake exploratory visits and/or make enquiries where appropriate;
- 4.4. ensure that parents are appropriately informed about visits and their written consent and other information are obtained where appropriate;
- 4.5. ensure that insurance and any financial support procedures are followed;
- 4.6. ensure emergency procedures, contingency arrangements (Plan B) and systems for recording and sharing information on accidents and near misses are in place before briefing young people and parents;
- 4.7. ensure that risks are managed;
- 4.8. ensure appropriate supervision of the young people at all times. The Visit Leader must be with the group at all times unless specific arrangements have been made and approved by the Headteacher;
- 4.9. ensure that the visit complies with the 'All visits planning and monitoring checklist' are located in Resources.



- 4.10. Best practice is that for delegated visits ensure that the visit has been approved as follows: To the EVC 2 weeks before departure and to the Headteacher one week before departure (see Appendix B.). For non-delegated visits (Overseas, Residential, including one or more Adventurous Activities, submit forms for authorisation to the EVC 6 weeks before departure, to the Headteacher 5 weeks before departure and to HET 15 working days before departure.

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## 5. **Leaders** (Teachers, Teaching Assistants, other school staff, volunteer adults)

Leaders will, in accordance with establishment policy and employer's guidance:

- 5.1. have a thorough understanding of their role within the visit;
- 5.2. follow the Visit Leader's instructions at all times;
- 5.3. inform the Visit Leader of any safety concerns, or the Headteacher if for some reason the Visit Leader does not implement control measures necessitated by changes in circumstances
- 5.4. have sufficient information and resources to enable them to contribute to the effective and safe running of the visit, particularly relating to the young people taking part, itinerary for the visit, risk management arrangements and the emergency procedures and contacts;
- 5.5. if the main group separates into smaller groups, each group should be led by a suitably competent Leader. Leaders who are not employees (e.g. volunteers) should not normally be left in charge of a group unless previously agreed at the planning stage of the visit. A possible exception could be where an unanticipated emergency requires a volunteer to step-in.

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## 6. **Parents**

- 6.1. The establishment will give parents details about Off-site Visits practice and safety procedures;
- 6.2. Parents will be given sufficient written and other information about all visits to make informed decisions and give written consent, medical and contact details, where appropriate, in accordance with this policy;
  - 6.2.1. For Adventurous Activities, residential and overseas visits, meetings with parents will be arranged and visit-specific written consent will be required together with up to date information on participants (e.g. current medical issues, emergency contact details);
  - 6.2.2. For visits other than those stated in 6.2.1 above, parents will be required to sign a one off consent form
- 6.3. For more complex visits e.g. residential, Parents will be offered an opportunity to meet with the Visit Leader to receive information and discuss arrangements for the visit.
- 6.4. Expectations of behaviour and codes of conduct will be explained to parents. This will include the need to meet the cost and make arrangements for collecting children in certain circumstances.

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## 7. Young People

- 7.1. Young people should be briefed about aims, expectations and codes of conduct for all visits. Ongoing briefings are an important part of learning and safety and must be carried out when necessary;
- 7.2. Where possible young people should be involved with planning, developing codes of conduct, assessing/managing risk and evaluating their own attitude, behaviour, development and learning.
- 7.3. Pupils will not bring mobile phones or other electronic communication devices on visits.

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## 8. Voluntary Helpers

Volunteers will:

- Assist Visit Leaders by overseeing the supervision of small groups of pupils **always** under the direct supervision of the Visit Leader.
- Adhere to academy staffing policies and expectations regarding general behaviour e.g. no smoking, no using mobiles, appropriate verbal communication with pupils, use of cameras etc.
- Remain “in the sight” of the Visit Leader at all times.
- Hold an enhanced DBS if they are working regularly in activities where they may lead coaching or deliver a specific activity e.g. football or dance.
- Be available prior to the visit to discuss the risk assessment and procedures with the Visit Leader. A copy of the risk assessment will be issued to the volunteer and specific duties/protocols will be explained.

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## Appendix B: HET Off-site Visits and Activities Approval Procedure

### 1. Off-site visits and related activities requiring approval

- 1.1. All Off-site Visits and related activities require approval from HET (the employer). The employer may delegate approval to the Headteacher of the establishment for some or all types of visit (see 1.2 below).
- 1.2. Approval of the following visit types (see 2.1 below) are delegated to the Headteacher of the establishment:
- Day visits within the UK, that **DO NOT** involve an overnight element or any Adventurous activities
- 1.3. Approval of Overseas and Residential visits and any visit that includes one or more Adventurous Activities (see 2.1 below) must be approved by the Off-site Visits Adviser on behalf of HET.
- 1.4. Under no circumstances should any visit take place without approval, as stated in section 3 below.
- 1.5. In order to gain approval, this Approval Procedure must be followed and, where required, an online Off-site Visits Form completed on the EVOLVE website, appropriately authorised and approved.

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### 2. Visit types

- 2.1. These have been defined as simply as possible in the table below and should be considered in conjunction with the 'Type' page on the EVOLVE online visit form.

<p><b>'Residential'</b> on the 'Type' page</p>	<p>Any visit that includes one or more overnight stays e.g. Youth Hostel, Hotel, Outdoor Activity Centre, campsite, coach/train for journeys through the night.</p>
<p><b>'Overseas'</b> on the 'Type' page</p>	<p>Any visit that extends beyond the boundaries of the United Kingdom</p>
<p><b>'Adventurous'</b> on the 'Type' page</p> <p>Adventurous Activities that are led by either <b>external provider staff</b> or the <b>establishment's own staff</b> must be clearly identified on the Visit Type page by checking the appropriate box</p>	<p>Any visit that includes one or more Adventurous Activities as defined in Section 21 of the employer's guidance.</p>
<p><b>All other visits that do not fall into any of the above</b></p>	<p>Day visits within the UK, that <b>DO NOT</b> involve an overnight element or any Adventurous activities.</p> <p>Visits that take place within the Local Learning Area will not require approval through EVOLVE (see 2.3 below).</p>

**2.2 It is important to recognise that some visits may require more than one of the boxes checking on the EVOLVE 'Visits Type' page.**

2.3 A Local Learning Area is defined by an establishment and a list of frequently used venues (Appendix E of this policy). The area would normally be accessible on foot or very short vehicle journey from the establishment.

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### 3 Obtaining approval for a visit

3.1 Members of staff wishing to organise an off-site visit should discuss their proposals with the EVC in the first instance before following the procedure from 3.3 below. For overseas visits and those involving complex arrangements, staff must be prepared to discuss such visits well in advance, possibly 12 months before the departure date. **The Off-site Visits Adviser should be consulted about such visits during the early planning stage and before a financial commitment or contract is made with a third party.**

3.2 No financial or contractual commitment should be made to an external provider (e.g. Tour Operator) without the authorisation of the Headteacher.

3.3 Where an establishment has defined a Local Learning Area, visits within that area are not required to be entered on EVOLVE and are subject to the following;

3.3.1 Prior to the visit taking place, the Visit Leader should seek approval from the Headteacher, Assistant Headteacher or Vice Principle.

3.3.2 The destination, expected time of return, a list of pupil participants and a list of Leaders (including contact details) must be left in the establishment Office prior to departure;

3.3.3 The visit and associated activities must comply with the Local Learning Area Safe Working Procedures and Event Specific Notes (if completed);

3.3.4 Upon return to the establishment, the Visit Leader must report back to the establishment Office.

3.4 For visits other than those in 3.3., the visit organiser (usually the Visit Leader) should create a new visit form on EVOLVE and complete the Type page. It is essential that this page is completed accurately as the content of the form will vary depending on the selection made. If in any doubt, the Visit Leader/organiser must consult the establishment EVC before proceeding.

3.5 After completing the Visit Type page, the online visit form must be fully completed before it is submitted to the EVC for approval.

3.6 Visit forms must be submitted for approval well in advance of the visit to enable the arrangements to be monitored prior to approval being granted.

3.6.1 For Visit Types, 'Overseas', 'Residential' and 'Adventurous' (see 2.1 above) the visit form should be submitted at least 25 working days in advance of the departure date.

3.6.2 For all other visits, the visit form should be submitted at least 15 working days in advance of the departure date.

3.7 Following submission of the visit for approval, its progress may be tracked from the green [Track] tab on the EVOLVE Home page. Click on the [Submitted] tab to see which account the visit form is currently located (EVC / Head (Headteacher) / OE). When it has been approved it will appear on the [Approved] tab.

- 3.8 **It is the responsibility of the Visit Leader to ensure that their visit is approved prior to departure. Merely submitting a visit form to the EVC is not, by default, approval for the visit.** At any point in the process, Visit Leaders can track the approval status of their visit form from their [Track] page. If they feel that the visit is not making expected progress through the system they must consult the EVC well in advance of the visit departure date.
- 3.9 **Under no circumstances should a visit be taken out of the establishment without approval. The visit MUST be in the [Approved] section of the [Track] page, prior to departure, to confirm approval has been given.**

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#### 4 Criteria upon which approval for a visit is given

- 4.1 When approving a visit the Headteacher of the establishment is confirming the following:
- 4.1.1 The visit form is completed fully and accurately;
  - 4.1.2 The arrangements for the visit have been checked and approved according to the current HET and establishment policies and *Employer Guidance*;
  - 4.1.3 The Visit Leader and assistant Leaders are appropriately competent to deliver the aims and objectives and safety management requirements of the visit;

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#### 5 Key roles and responsibilities of the Visit Leader, EVC and Headteacher in relation to EVOLVE and the online Approval Procedure

- 5.1 Reference should be made to Appendix A of the Trust's Policy for the Management of Off-site Visits for a summary of the roles of stakeholders in the visits process.
- 5.2 This section focuses on specific roles and responsibilities in relation to EVOLVE and the online approval procedure.
- 5.3 The **Visit Leader** should:
- 5.3.1 be familiar with the HET approval procedure;
  - 5.3.2 be familiar with the HET visits policy and employer's guidance and associated establishment policies;
  - 5.3.3 be aware of the location of the most up to date versions of HET visits policy and guidance and other information and resources on the EVOLVE website;
  - 5.3.4 check, complete and keep up to date the 'My Profile' page (Tools section) of their EVOLVE account section, ensuring that any relevant awards, qualifications and training are entered onto their 'Awards & Training' section;
  - 5.3.5 create and complete an online EV form for all the visits they are leading, subject to the Local Learning Area arrangements;
  - 5.3.6 submit the form online to the establishment EVCs when complete and within the timescale requirements in

- accordance with this procedure and their employer's off-site visits policy;
- 5.3.7 check the progress and status of the visit form (approval request) by logging-on to EVOLVE and opening the [Track Visits] page and selecting the appropriate tab;
  - 5.3.8 only take a visit out of school that has been 'Approved' i.e. the visit is in the [Approved] section of their [Track] Visit page. Do not rely on E-mail alerts;
  - 5.3.9 contact the EVC if the visit is not appearing to progress through the process;
  - 5.3.10 seek help/request training through the EVC, as necessary.

#### 5.4 The **EVC** should:

- 5.4.1 be the EVOLVE system manager for the establishment;
- 5.4.2 provide/arrange information/training for all establishment Users;
- 5.4.3 setup & manage Staff/Read Only Users on the system and arrange for amendments/additions to Headteacher/EVC accounts to be made;
- 5.4.4 monitor forms submitted by Staff Users for compliance with HET requirements and ensure that they have been completed accurately and correctly;
- 5.4.5 submit forms to the Headteacher / return forms to Staff;
- 5.4.6 receive and process returned forms from either the Headteacher or the Off-site Visits Adviser;
- 5.4.7 monitor forms-in-progress (Staff Users – Unsubmitted visits & forms awaiting approval by the Headteacher);
- 5.4.8 keep up to date with current news and updates on EVOLVE & inform/alert Headteacher and Users as appropriate. EVCs should access their EVOLVE account on a regular basis to check for updates and monitor visits. They must not rely of E-mail alerts.

#### 5.5 The **Headteacher** should:

- 5.5.1 ensure that the EVC is appropriately trained and competent to fulfil their role as outlined above;
- 5.5.2 be familiar with the approval procedure;
- 5.5.3 keep up to date with current news and updates on EVOLVE;
- 5.5.4 be aware of and monitor EV forms submitted by the EVC at the earliest opportunity and process (authorise or return) them without undue delay.

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## Appendix C

### Forms, Checklist and other HET Documents

The table below lists all the Trust's documents, referenced in either this policy or the *Employer Guidance*, and where definitive versions may be downloaded from EVOLVE.

Document	Type	EVOLVE Resources Area Location	Policy Reference	Guidance Reference
HET Policy for the Management of Off-site Visits & Related Activities	Employer & Estab. Policy	HET Policy & Guidance	All	All
HET Guidance for Off-site Visits & Related Activities	Employer Guidance	HET Policy & Guidance	All	All
HET Guidance for the Management of Incidents, Emergencies and Critical Incidents during an Off-site Visit.	Employer Guidance	HET Policy & Guidance	All	All
Managing Risk Relating to Terrorism and Civil Unrest	Employer Guidance	HET Policy & Guidance	All	All
Event Specific Notes Form	Form	HET Forms & Docs	Section 8	Section 7
Event Specific Notes Form (examples only)	Support	HET Forms & Docs	n.a.	n.a.
Risk Management	Support - Flowchart	HET Forms & Docs	Section 8	n.a.
Parental Consent & Information (One-off)	Form	Establishment Docs	Section 9.3	Section 9
Parental Consent & Information (Visit Specific)	Form	Establishment Docs	Section 9.2	Section 9
Private Car Form	Form	Establishment Docs		Section 14
All Visits Checklist	Checklist	HET Forms & Docs		
Provider Form	Form	HET Forms & Docs		Section 29
Checking Providers	Support - Flowchart	HET Forms & Docs		Section 29

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## Appendix D

### Safe Working Procedures

Refer to Section 8. for use

**Please Note:** Safe Working Procedures must be considered to be the beginning, rather than the end of the risk management process. Those responsible for organising, leading and monitoring visits should ensure that any significant hazards associated with a particular visit have been identified and the risks associated with them adequately controlled. In particular, consideration should be given to STAGED (Staff, Timings, Activity, Group, Environment, Distance) and, where appropriate, the findings should be recorded on an **Event Specific Notes Form**.

Up to date versions of these documents are available from the Safe Working Procedures page in the EVOLVE Resources area.

It is NOT necessary to attach these documents to visit forms as part of the visit approval process. SWP(s) to be referenced for a visit can be identified when completing the Risk Management section of the visit form. However, significant variations to SWPs for a visit should be recorded on the ESNF for the visit.

1. **Travel by coach/bus/minibus** With Provider's driver
2. **Travel by Ferry/Ship/Boat** Commercial sailings only
3. **Travel by Self-drive Minibus establishment or hired, 16 or fewer pass. seats**
4. **Travel by taxi**
5. **Travel by Train** Includes trams & underground
6. **Travel by Aeroplane commercial flights only, includes commercial Helicopter flights**
7. **Travel by private vehicle** 8 or fewer passenger seats
8. **Unaccompanied Visits/Travel organised by academy, with no accompanying Leaders**
9. **Travel on foot near roads**
10. **Remote Supervision includes indirect supervision**
11. **Residential Accommodation**
12. **Tour Operator / activity provider**
13. **Overseas Visits** Temperate climate / low altitude locations
14. **Visiting towns & cities**
15. **Visitor Attractions: Museums etc** Museums, Galleries, Theatres etc
16. **Visitor Attractions: historic sites** Castles, ruins & wall walks etc
17. **Visitor Attractions: theme parks**
18. **Farm Visits**
19. **Coastal Visits (Do not have)**
20. **Parks & Gardens includes zoos**
21. **Walking in low-level countryside**
22. **Field studies (water margins)**
23. **Visiting local schools & colleges**
24. **Sports Matches & Events**
25. **Bathing in open water** Paddling/Swimming in the sea, lakes, rivers etc
26. **Swimming Pools** Public & Private, UK & overseas
27. **Ice Skating (rink)** purpose built rinks
28. **Snowsports (artificial/indoors) includes 'snowdomes' & artificial outdoor slopes**
29. **Snowsports Courses** UK & overseas, on-piste skiing & snowboarding

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## Appendix E

### Local Learning Area: X Primary School

This Local Learning Area (LLA) may be used for a variety of low risk learning activities on an *ad hoc* basis by approved Leaders following the agreed standard operating procedure. These visits will not be required to be recorded on EVOLVE in accordance with Sections 2.1 and 2.3 in Appendix B of the *HET Policy & Procedures for the Management of Off-site Visits and Related Activities*.

#### Boundaries

The LLA will be the area around the academy which is within walking distance from the academy. It will include the following specific venues:

A:

B:

#### Operating Procedure

The following are potentially significant hazards within our LLA:

- Road traffic
- Other people / members of the public / animals
- Losing a pupil
- Uneven surfaces and slips, trips, falls
- Weather conditions
- Activity specific issues when doing environmental fieldwork (nettles, brambles rubbish etc)

These will be managed by a combination of the following:

- Visits to the LLA will take place entirely during the academy day;
- Only staff judged competent to lead and supervise groups in this environment are approved. A current list of approved staff is maintained by the EVC.
- Parents/carers will be made aware of the Local Learning Area concept and operating procedure.
- At least two Leaders should normally accompany a group visiting the LLA. Where only one Leader is present, this must be specifically authorised by the Headteacher.
- Leaders will be familiar with the LLA, including any 'no-go areas' and have practiced appropriate group management techniques.
- Children will have been trained and practiced in standard techniques for road crossings in a group.
- Children will be fully briefed on what to do if they become separated from the group.
- All remotely supervised work in the local area is done in 'buddy' pairs as a minimum.
- Children's clothing and footwear will be checked for appropriateness before leaving school.
- Leaders will carry pupil medical information, First Aid kit and emergency contact details, as appropriate.

- The Visit Leader will deposit a list of all pupils and staff, a proposed route, venue(s) to be visited and an estimated time of return, in the academy office. The Office will have mobile contact number(s) of the Leader(s).
- Appropriate personal protective equipment will be taken, as required (eg gloves, goggles)

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