



## **Planning an off-site visit**

# **A guide for Visit Leaders, EVCs and Head Teachers**

Devon County Council and  
Torbay Council establishments and  
subscribing Academies

To be read in conjunction with Outdoor Education,  
Visits and Off-Site Activities Health and Safety Policy  
(OEVOSA 2018)

**Version 3 – October 2018**

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## **1. Planning & Recording**

The use of EVOLVE to record ALL off-site visits means that all the relevant documentation and records are available in one place for all staff to see even remotely. This can be helpful when EVCs or SLT members need to access visit information in the event of emergencies or problems in the evenings or at weekends.

Use of EVOLVE takes you through each stage of the planning and approval process.

Use of EVOLVE also means that staff can search previous recorded visits to access planning documents and forms as well as reading previous visit's evaluation and outcomes to aid planning the next visit.

## **2. Safeguarding**

The safety and welfare of children is paramount. In the event of a safeguarding issue or concern being identified during the visit, the Visit Leader should follow the school's child protection/safeguarding policy and procedures. All staff and volunteers on the visit should be made aware of these before the trip or activity takes place.

Arrangements should be in place to enable contact with the school's Designated Safeguarding Officer outside normal school hours if necessary.

Contact details should be available to all staff/volunteers on the trip (as well as the Visit Leader) in case the safeguarding concern is about the Visit Leader.

## **3. GDPR**

Visit Leaders and accompanying adults need to know what they need to know about children in their care, GDPR regulations do not change this.

When sharing personal or sensitive information the school should do so in accordance with its published privacy policy, but this policy should not prevent Visit Leaders or accompanying adults having ready access to information such as medical conditions, parental contacts etc. It is acceptable to anonymise pupil information such as; "Charlie B has a nut allergy and carries and Epipen" so long as all accompanying adults can identify any specified children.

Parental consent forms should include information about the school's GDPR policy, or reference to it. Your school GDPR policy should specify how information is stored, used and destroyed but this does not prevent people holding paper or electronic records where necessary and for the intended (agreed) purpose.

## 4. Timescales

Please ensure all visits are submitted to the LA in accordance with the policy;

- a) Category B (adventurous day visits) – 2 weeks in advance
- b) Category B (adventurous residential visits) – 2 months in advance
- c) Category C (overseas visits) – 3 months in advance

It would be good practice to add at least 1 week to the above timescales for in school approval. Your own timescales should be set out in your School Off-Site Visits Policy.

**Failure to meet these timescales means the LA may not be able to fully scrutinise the visit and may mean the visit does not get LA endorsement.**

With complex or overseas visits where the school would like LA support before it is submitted, please add a note to the LA on the visit form asking for oversight/input. This will appear in the LA inbox so we can see the visit. This means you do not need to complete the whole visit form and submit it before the LA sees it.

Without adding a note to the visit form the LA will not know it exists.

## **5. School Off-Site Visits Policy**

A 'model' school Off-Site Visits Policy is available on EVOLVE, (Evolve/Resources/Guidance, Policies & Documents/Forms/Model Off-Sites Visits Policy).

When drawing up the "School Off-Site Visits Policy" consideration should be given to the range of trips, visits and activities that are regularly carried out.

Schools can use this model policy to draw up their own school specific policy. The policy should accurately reflect what the school actually does/will do. Once done, the policy should be reviewed regularly along with other school policies.

The School Off-Sites Visits Policy should detail how you apply the Local Authority Policy in your school or setting. It does not replace the Local Authority Policy.

It may make reference to other school policies, i.e. Safeguarding, Staff Code of Conduct, etc. You shouldn't need to re-write these elements within the Off-Site Visits Policy if they are documented elsewhere and staff know about them.

The purpose of the School Off-Site Visits Policy is to make clear to all staff what the expectations are. This could include reference to;

- Staff children on visits
- Staff spouses/partners on visits
- Alcohol policy
- Inclusion and access for pupils to off-site visits
- Etc.

By detailing the 'rules' on staff behaviour and expectations and formalising them in a school policy, this should prevent problems arising.

## 6. Risk Management

Risk Management falls into 3 categories;

- a) School Standard Operating Procedures (Routine & Regular visits)
- b) Adventurous Activity Specific Risk Assessment
- c) On-going Risk Management

### **SCHOOL STANDARD OPERATING PROCEDURES**

Four example 'School Standard Operating Procedures' can be found on EVOLVE; (Evolve/Resources/Guidance, Policies & Documents/Forms/ School Standard Operating Procedures).

- Walking from school
- Day visits using transport
- UK residentials
- Overseas residentials

The School Standard Operating Procedures should detail the procedures staff and pupils should follow "this is how we do it in our school". It should cover foreseeable eventualities/risks and detail what action should be taken.

### **COMPLETION OF THE SCHOOL STANDARD OPERATING PROCEDURES**

The Head Teacher along with a group of experienced Visit Leaders and the EVC should work through the 'model' School Standard Operating Procedures, and amend columns 1, 2 and 3 to reflect the expectations and practice **in your establishment**.

**Then for each off-site visit the Visit Leader needs only to re-name and re-date the document appropriate for their visit and complete column 4 with any additional measures for their specific visit. i.e. Charlie A has Epipen, Mrs X will carry spare, or Charlie B SEN 1:2:1 with Mrs Y etc.**

A common sense approach should be taken covering 'significant' hazards. As with all policies and procedures they need to be reviewed regularly and amended as necessary.

It is a good idea to save a copy of your own amended School Standard Operating Procedures on Evolve in the Establishment Documents section. This means Visit Leaders can find the up to date school version easily and it prevents old or 'rogue' versions being used by staff.

## **ADVENTUROUS ACTIVITY SPECIFIC RISK ASSESSMENT**

When adventurous activities (Category B) are being led by school staff or volunteers i.e. use of climbing walls, bushcraft, moorland walking etc. then an Activity Specific Risk Assessment needs to be completed for that activity/visit.

The Activity Specific Risk Assessment does not need to repeat what is already recorded in the SOP, it should record what is NOT already covered, i.e. risks associated directly with that activity; i.e. for water sports; drowning, hypothermia etc. for moorland activities; river crossings, getting lost, remote supervision/checkpoints etc.

An example of an Activity Specific Risk Assessment can be found on EVOLVE; (Evolve/Resources/Guidance, Policies & Documents/Forms/Risk Assessment).

If the Visit Leader is 'competent' to lead the activity they should have no problem in writing a risk assessment for it. Skilled practitioners should not ask the EVC to 'send them' the activity risk assessment for their own activity.

## **ON-GOING**

The School Standard Operating Procedures (and Activity Specific Risk Assessment) documents form part of the pre-planning, once the visit is underway the Visit Leader and all Staff must be aware of the need for an On-Going risk assessment, what has changed or isn't as expected when the risk assessment document was completed? Appropriate action needs to be taken by the Visit Leader depending on these factors. This could mean closer supervision, a changed location or a changed activity.

## **AFTER THE VISIT**

After the visit the Visit Leader should complete the 'evaluation' section of Evolve and note anything that should be borne in mind for next time. Any issues relating to risk management should be noted and the School Standard Operating Procedures amended for future reference.

## 7. Providers

There are different types of external providers;

- a) Activity Providers
- b) Residential Providers
- c) Tour Companies
- d) Expedition companies

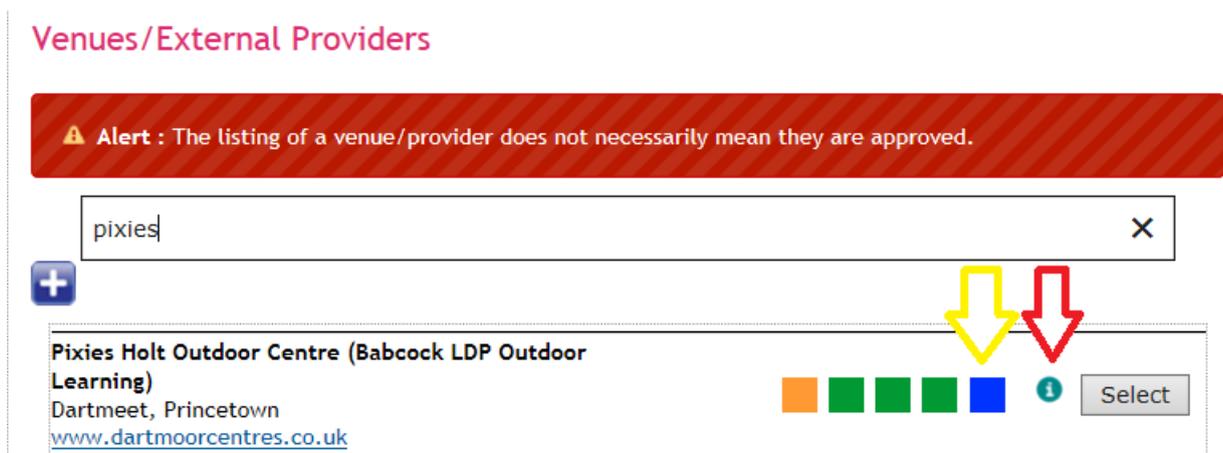
When using a provider to support your visit, the Visit Leader needs to ensure they meet certain standards. To do this the Local Authority has created a Provider Questionnaire Form, (Form SOE5).

There is also a national accreditation scheme that awards providers with a Learning Outside the Classroom Quality Badge (LOTC Quality Badge).

When completing your visit on EVOLVE you will be asked to complete the box “Venues/External Providers”. At this point you can search for a provider. Many providers work with several local schools so you may find them already listed in your search.

Visit Leaders are advised to read the relevant SOE5 on file. The LA does not ‘endorse’ or ‘approve’ any providers. The listing of existing providers on Evolve simply means that others schools have used them.

The image below shows that this provider has completed an SOE5 for the current year (blue box) for quick reference the colour of the box changes each year.

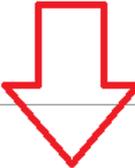


Existing SOE5s can be read by clicking the small circle with the letter i in it.

This opens another window, the SOE5 is attached as a PDF at the bottom, this can then be opened and read, see below.

Telephone :	01364 631500
Email :	ldp-dartmoorcentres@babcockinternational.
Website :	<a href="http://www.dartmoorcentres.co.uk">www.dartmoorcentres.co.uk</a>
Applicable Status Codes:	<p><b>SOE5 2014</b> This provider has completed an SOE5 form for 2014. Please read this form which is on the Resources tab.</p> <p><b>SOE5 2015</b> This provider has completed an SOE5 for 2015. Please read the form before using the provider.</p> <p><b>SOE5 2016</b> This provider has completed an SOE5 for 2016. Please read the form before using the provider.</p> <p><b>SOE5 2017</b> This provider has completed an SOE5 for 2017. Please read the form before using the provider.</p> <p><b>SOE5 2018</b> This provider has completed an SOE5 for 2018. Please read the form before using the provider.</p>






Provider\_Questionnaire\_SOE5\_2018\_1.docx (Sam Hemming @ 18/01/2018 12:42:51) ✕

**It is NOT necessary to re-attach the SOE5 to the visit form if it is already stored on Evolve.** Only newly completed SOE5s need be attached to the visit form.

Please note; providers and venues names can get mixed up and schools can sometimes use old or inaccurate names in the search. For example; adventurous activities at River Dart Country Park are provided by a separate company called CRS Adventures. When searching for a provider please make sure you use the correct name of the company that your contract will be with, rather than the venue if different.

If the provider holds the LOTC badge this will show next to their name (see below). LOTC accreditation records are maintained by Edufocus and the LOTC logo should only appear for providers whose award is current. If you wish to make further checks go to; <http://lotcqualitybadge.org.uk/search>

### Venues/External Providers

 **Alert :** The listing of a venue/provider does not necessarily mean they are approved.

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<p><b>Skern Lodge</b> <a href="http://www.skernlodge.co.uk">www.skernlodge.co.uk</a></p>			 <span style="border: 1px solid #ccc; padding: 2px 10px; margin-left: 5px;">Select</span>
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If the provider has an LOTC Quality Badge or they have completed a Provider Questionnaire (Form SOE5) for the current calendar year (noted on the provider page), then you do not need to ask them to complete a new one.

If you plan to use a provider that is not already listed or one that does not have an SOE5 for the current calendar year, nor an LOTC Quality Badge, then the Visit Leader

must ask them to complete one (Evolve/Resources/Guidance, Policies & Documents/Forms/Provider Questionnaire SOE5).

The Visit Leader must then check that the answers are acceptable. If in doubt contact the Outdoor Education Adviser or Health & Safety Team for clarification.

The completed Provider Questionnaire should then be attached to the visit form on EVOLVE.

**Visit Leaders SHOULD NOT request activity risk assessment documents relating to activities from the Provider.**

**Nor should they request risk assessments for buildings/centres/venues.**

If they have particular concerns about their group's use of a building or space then they should visit and carry out their own risk assessment based on their knowledge of the group or individuals. The venue provider cannot realistically do this for you without knowledge of the group.

## **OVERSEAS VISITS**

Particular care should be taken when engaging external providers to support overseas visits. For detailed guidance check the current OEVOSA Policy.

Visit Leaders should ensure the planned visit is appropriate for the group's needs and abilities. Expedition companies have very effective marketing departments and target schools to sell their trips. Taking a small number of students to the Himalayas may be exciting, but a lower risk and easier to manage trip to the Alps is usually more appropriate, just as rewarding and cheaper, allowing greater participation and inclusion.

Group Leaders should pay particular attention to 'down-time' supervision and risk management on visits to organised activities such as ski trips. Groups often take part in other activities such as swimming or ice skating on such trips, and these need to be adequately supervised and risk assessed.

The Visit Leader should include all activities (including evening activities) in the Standard Operating Procedures for their visit, with appropriate supervision plans.

## 8. Documents required

For different categories of activities and types of visit, separate supporting documents need to be attached to the EVOLVE visit form.

Below is list of minimum requirements for different types of visits as examples. For each specific visit there may be more documents depending on your school organisation and the visit needs.

### **CATEGORY A** (Authorised by Head)

#### **Walk to local site (i.e. local woods, places of worship, shops etc)**

- The School Standard Operating Procedures amended, named and dated for this visit.

#### **Non-Adventurous Residential (i.e. trip to London museums and galleries etc.)**

- Copy of the letter to parents setting out the details of the visit.
- Itinerary including evening activities.
- The School Standard Operating Procedures amended for this visit.
- Provider Questionnaire (SOE5) from residential provider if new provider.

### **CATEGORY B** (Endorsed by Local Authority)

#### **Adventurous activity led by school staff (i.e. Ten Tors, DofE, climbing etc)**

- Copy of the letter to parents setting out the details of the visit.
- The School Standard Operating Procedures amended for this visit.
- Activity Specific Risk Assessment for the adventurous activity led by staff.
- List of Leader/Staff/Volunteers qualifications – Sport/First Aid if not on their staff profile on Evolve).
- If walking, cycling or camping expedition a route card/daily program/campsites

#### **Residential to Adventurous Activity Centre**

- Copy of the letter to parents setting out the details of the visit.
- Itinerary/program of activities.
- The School Standard Operating Procedures amended for this visit.
- LOTC badge or Provider Questionnaire (SOE5) for current calendar year if not already on Evolve.

Note: you DO NOT need to ask for risk assessments from the centre

## **CATEGORY C (Endorsed by Local Authority)**

### **Overseas trips (i.e. ski trips, exchange visits, cultural visits etc)**

- Copy of the letter to parents setting out the details of the visit.
- Details of venue (SOE5). Or equivalent checks
- Travel details, including flight numbers and timings of coach journeys.
- Programme/Itinerary (including evening activities).
- The School Standard Operating Procedures (relevant for overseas travel) amended for this visit.
- Group list including, names, and relevant medical info.
- Emergency contact/back at base names with phone numbers.
- Contract with 3rd party tour operator.
- Insurance documents.

### **Expeditions to remote areas of the world (Mountain Trekking, Volunteer projects etc)**

All of the above plus;

- Evacuation plan
- Plan B evidence
- Phone numbers for British Embassy in the country of travel.
- List of medical facilities and distance from group at each point of the expedition
- In-country contact names, access to in-country support if needed
- Info about medication recommended, vaccinations, malaria meds etc
- Plan for accessing emergency medical treatment including transport options
- Information about communication systems available (do mobile phones work in all areas of the expedition?)

## 9. Staff Activity Qualifications

At all times the employer remains responsible for ensuring staff are 'competent' to carry out their duties (Health & Safety at Work Act 1974). Therefore the Head, Governing Body or Academy Trust must ensure staff or volunteers leading adventurous activities are competent.

The Health & Safety Executive and the Adventurous Activities Licensing Agency consider competence to be determined in one of three ways;

- (a) Externally awarded qualifications (National Governing Body or Local Scheme); or
- (b) In-house training; or
- (c) Experience.

Evidence of (a) will usually be an NGB/Local award and for (b) or (c) a Statement of Competence. Such Statement of Competence should be provided by a Technical Adviser who is qualified to assess an equivalent award under an NGB/Local scheme.

### **ACTIVITY LEADER FORMS (ALF)**

When setting up or amending EVOLVE accounts, staff (and EVCs) have the opportunity to add activity leader qualifications to their account. The term used on EVOLVE is Activity Leader Form (ALF). Put 'ALF' into the search box and instructions how to do this will be shown.

**It is essential that school staff leading adventurous activities have their qualifications recorded under the ALF section. If any staff do not appear to be qualified they will NOT be endorsed to lead such visits and the visit form will be returned by the LA.**

### **VOLUNTEERS (as qualified adventurous activity leaders)**

Where visits are reliant on the leadership or support of suitably qualified 'volunteers', the EVC can add a note to the volunteer profile. If they are not set up on Evolve, a separate 'word' document should be attached to the Visit Form. This document **MUST** be a scanned copy of the relevant qualification/s.

Without a copy of their activity qualification, volunteers will not be included in the leader/pupil ratios for the activity. Without appropriate leader/pupil ratios for the activity, the visit form will be returned and the visit will not be endorsed by the LA.

For detailed guidance on leader/pupil ratios for adventurous activities led by School Staff check OEVOSA.

Schools are reminded that when volunteers are used to support a visit they are treated as staff for Health & Safety purposes and therefore the Head Teacher must be confident that they are 'competent' to carry out their role. Volunteers should not be relied on because they "know what they are doing" or "have done it for years", or "used to be in the Army" as with staff, qualifications or formal Statements of Competence must be seen and recorded on Evolve.

Volunteers can provide qualified leadership for visits but a member of school staff **MUST** be the Visit Leader and remains responsible for the visit at all times.