

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 2024)

Version 6 – September 2024

This document should be read in conjunction with

“Evolve Starter Guide – Sept 2024”

and

Evolve/Resources/How to Videos

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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 Lead 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 an 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 camping, i.e. Ten Tors/DofE) – 2 weeks in advance
- c) Category B (adventurous residential visits) – 2 months in advance
- d) 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.

Within the school policy templates provided by the LA (2024 versions) there is a section on submission timescales. This allows the school to extend the LA timescales in order to allow time for the EVC and Head to carry out their roles and still meet LA deadlines.

Completion of evolve visits forms, creating SOPs, gaining SOE5s from Providers etc. are part of the planning process and should be done in good time. Visit forms that are created at the last minute (often when the visit has been planned for many weeks or months) are often error ridden and require returning to the School by the LA creating last minute panic and possibly visit delays.

The evolve audit trail, time and date stamps all stages. If an accident or incident happened on a visit that was then subject to investigation, the audit trail 'may' indicate that the plans were rushed which 'may' have a bearing on the outcome of the investigation.

5. School Off-Site Visits Policy

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

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 at least every two years in line with the LA Policy (normally September).

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 refer 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;

- Submission timescales (including allowance for in-school approval)
- 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 submission timescales, staff behaviour and expectations and formalising them in a school policy, this should prevent problems arising.

In Law, it is the responsibility of the employer (the Head/Governing Body) to ensure/enforce adherence to the school policy.

6. Risk Management

Risk Management falls into 3 categories;

- a) School Standard Operating Procedures
- b) Adventurous Activity Specific Risk Assessment
- c) On-going Risk Management

SCHOOL STANDARD OPERATING PROCEDURES

The LA has made available 5 different versions of 'School Standard Operating Procedures'

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

These can be found at; Evolve/Resources/Standard Operating Procedures & Risk Assessments.

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**.

The School Standard Operating Procedures should detail the normal 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.

Once created, the EVC should upload your school SOPs to your own section of Resources called "Establishment Docs".

This means Visit Leaders can find the up to date school version easily and it prevents old or 'rogue' versions being used by staff.

EVCs only - For instructions on how to do this see "How to add school docs to your establishment library" in evolve/resources/school standard operating procedures.

Then for each off-site visit, the Visit Leader needs only to find the most appropriate version from your establishment documents, name and date it for their visit and complete column 4 with any additional measures for their specific visit

ADVENTUROUS ACTIVITY 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 a **separate** Adventurous Activity Risk Assessment needs to be completed for that activity/visit.

IN ADDITION TO THE VISIT SOP

The Adventurous Activity Risk Assessment does not need to repeat what is already recorded in the SOP, it should record the hazards/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 Adventurous Activity Risk Assessment Form template can be found at; evolve/resources/standard operating procedures and risk assessments

The LA does not provide examples of activity risk assessments. If the Visit Leader is 'competent' to lead the activity they should have no problem in writing a risk assessment for it.

ON-GOING

The School Standard Operating Procedures (and Adventurous Activity 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?

Where necessary, 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 & Venues

There are different types of External Providers;

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

Everywhere else (place/building/company) is a 'venue'.

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 other local schools so you may find them already listed in your search.

Visit Leaders, EVCs and Heads are reminded to read the SOE5 on file.

The LA does not 'endorse' or 'approve' any providers.

Instead, the LA provides you, the 'customer' with a mechanism to see the Provider's answers to relevant questions. If you have any questions about their answers, you should raise it with the Provider. If you have technical questions about activity qualifications or accreditation etc. you should raise these with the Adviser for Outdoor Education.

The listing of existing Providers on Evolve simply means that other schools have used them.

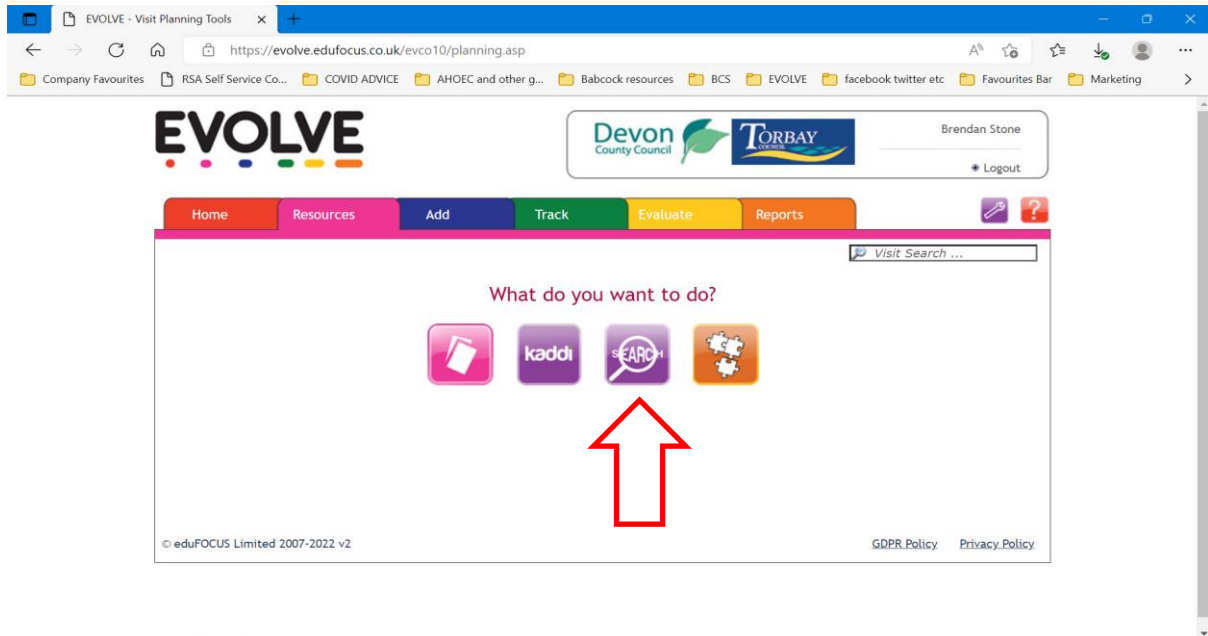
If you plan to use a provider that is not already listed or one that does NOT have an SOE5 for the current calendar year, then the Visit Leader must ask them to complete one. A blank form can be found at; Evolve/Resources/Forms/Provider Questionnaire SOE5.

SOE5s should be read and checked prior to any bookings made or money paid. If this is done at the last minute, you may not be happy with their answers resulting in a loss of money paid, delays or cancellation.

Checking Provider Questionnaires (Form SOE5)

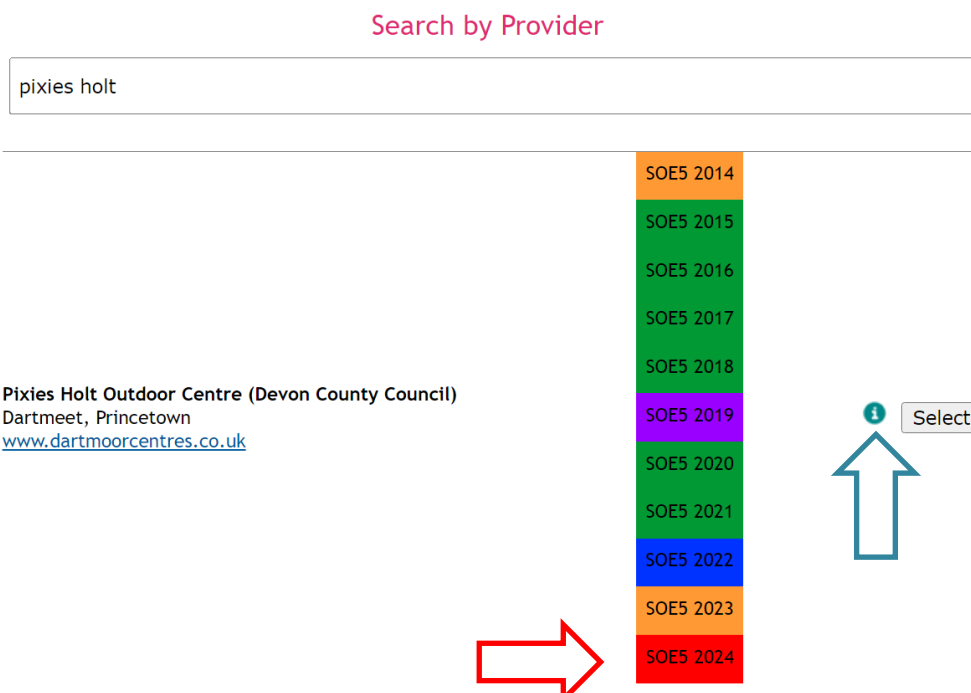
Before making a booking, you can check to see if a provider has a current SOE5

1. Go to; *Evolve/Resources/Search icon*



2. Then click the word 'Provider' on the left-hand list

A new field will open allowing you to search for the Provider's name. Providers with similar sounding names will also appear. Make sure that you are looking for the correct Provider, who is your booking with? Who are you paying?



The SOE5 can then be read by clicking on the small blue circle with the letter **i**

Reading SOE5s whilst completing a visit form

Venues/External Providers

pixies holt



Pixies Holt Outdoor Centre (Devon County Council)
Dartmeet, Princetown
www.dartmoorcentres.co.uk



⚠ Status: SOE5 2024: Status: SOE5 2024: This provider has completed an SOE5 for 2024. Please read the form before signing any booking forms or paying any money.

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.

EVOLVE

Devon County Council TORBAY

Provider : Pixies Holt Outdoor Centre (Devon County Council)
Address : Dartmeet
Princetown
Devon
PL20 6SG
Telephone : 01364 631500
Email : educate.educationdartmoorcentres-mailbox@devon.gov
Website : <https://www.dartmoorcentres.co.uk>
Applicable Status Codes: **SOE5 2024 Status: SOE5 2024: This provider has completed an SOE5 for 2024. Please read the form before signing any booking forms or paying any money.**

[SOE5_2024_Dartmoor_Centre.docx](#) (Jillian Widlake @ 29/01/2024 15:48:10) ✕


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. When searching for a Provider please make sure you use the correct name of the company that your contract is with, rather than the venue if different.

Learning Outside the Classroom (LOTC) Quality Badge

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.

✕



Skern Lodge
www.skernlodge.co.uk

Please note; **Kaddi** is not a form of accreditation, it is a customer reviews function which some providers choose to pay for.

Provider's Risk Assessments

Visit Leaders SHOULD NOT request activity risk assessments from Providers.

It is a waste of people's precious time to ask for activity risk assessments if you are not technically competent (qualified) to make a judgement on them. Under the Health & Safety at Work Act (1974) Providers are legally responsible for risk managing the activities of their business, including providing a safe environment for customers and visitors.

Nor should you request risk assessments from venues.

If you have particular concerns about the group or an individual pupil's use of a building or space then you should visit it yourself and carry out your own risk assessment based on your knowledge of the group's or individual's needs. The venue cannot realistically do this for you without knowledge of the group's particular needs. The findings of your visit will inform your own risk assessment and any significant issues/actions should be recorded on your SOP, for example:

"narrow steps to lunch hut prevent access for Charlie B in a wheelchair, venue staff will allow access via ramp at fire doors, confirmed by email from manager on 1.1.22"

If you cannot carry out a pre-visit to the building/venue then a phone call or email conversation may be sufficient to clarify any concerns.

Under the Health & Safety at Work Act (1974) venues/businesses are legally responsible for risk managing the activities of their business, including providing a safe environment for customers and visitors.

8. OVERSEAS VISITS

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

Considerable care must be given to overseas expeditions where schools are offered a 'composite group' booking and are 'paired' with another school or schools. Inevitably, this leads to supervision of your pupils by unknown staff from another school. Please seek advice from the LA Adviser in these circumstances.

If the school invites an expedition company into school to market their services to parents and a staff member signs a contract with the expedition company it is a SCHOOL VISIT. As such the LA will expect full planning and risk assessing. Only the Head should sign such a contract, after due deliberation to the consequences.

The LA recommends that when given the option, schools should inform expedition companies that all monies should pass from parents to school to the Provider, rather than directly from parents to the Provider.

The LA will NOT endorse overseas visits/expeditions where no supervising school staff are present.

Ski Visit activities

Visit Leaders (and Heads) should pay particular attention to evening activities and 'down-time' supervision and risk management during ski trips.

Groups often take part in other activities such as swimming, tobogganing 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.

Following the death of a Devon student on a ski lift in France in 2011, the Devon County Coroner has requested that Visit Leaders make specific reference to the supervision of students on ski lifts on their risk assessments (SOP). See OEVOSA Ski Visits.

Overseas Visits Programs and Supervision

Throughout the visit, it must be clear what the group is doing, where and what the supervision arrangements are. To assist with this a Program & Supervision Plan template is available at [evolve/resources/guidance](#). Please use this template.

9. 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 documents for different types of visits as examples. For each specific visit there may be more documents depending on your school procedures.

CATEGORY A (Authorised by Head)

- The School Standard Operating Procedures amended for this visit.
- Copy of the letter to parents setting out the details of the visit.
- Itinerary/program of activities.
- Provider Questionnaire (SOE5) if a new Provider or, out of date SOE5 on Evolve.

CATEGORY B (Endorsed by Local Authority)

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

- As above, PLUS:
- Adventurous Activity Risk Assessment for the activity led by staff.
- Copies of Volunteers qualifications – Sport/First Aid (if not already on their staff Volunteer notes on Evolve).
- Route card or scanned map if walking, cycling etc.

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.

CATEGORY C (Endorsed by Local Authority)

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

- As above PLUS;
- Travel details, including flight numbers and timings of coach journeys.
- Group list including, names, and passport details.
- Contract/Booking with Tour Operator
- Program & Supervision Plan

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?)

10. 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 to do so.

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.

STAFF ACTIVITY LEADER QUALIFICATIONS

When setting up or amending EVOLVE accounts, Staff (and EVCs) have the ability to add activity leader qualifications to their staff profile.

It is essential that school staff leading adventurous activities have their qualifications recorded on Evolve. If staff do not appear to be qualified, they will NOT be endorsed to lead such visits and the visit form will be 'processed'.

The Head or EVC should not approve or submit visit forms without confirming that the leader is competent. In Law the responsibility for maintain training records rests with the employer.

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. Instructions for this are available at [evolve/resources/how to videos](#).

As with staff, the employer is responsible for ensuring volunteers are competent. Activity qualifications should be seen by the EVC, and a record should be kept in school stating what award has been seen, when and by whom. Copies of awards should be retained by the school.

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.

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.

VISIT LEADERS - QUICK GUIDE TO CHECKING VISIT FORMS

1. Choose a Visit Name that describes the activity. If it is a regular activity include the month/year, for example:
“Year 6 residential Pixies Holt July 2025”
“Year 3/4 Forest School Autumn Term 2024”
“Ski Trip to Italy February 2025”
2. Check the adult/student ratios;
 - Non-adventurous day visits 1:15
 - Adventurous day visits led by external provider 1:15
 - Residentials (adventurous & non-adventurous) 1:15
 - Overseas 1:10
 - Adventurous ‘LED’ by school staff; see ratio matrix in LA Policy. most common are moorland walking which is 1 **qualified** walking leader for every 15 students.
3. If relying on “qualified” staff check qualifications are listed on their staff profile.
 - Go to ‘view form’ icon top left (purple eye)
 - Click on [staff member’s name](#)
 - Click on [Awards & Training](#)
 - If the relevant award is not showing ask the staff member to attach it to their profile
4. Check the same for other staff/[volunteers](#)
 - ‘Qualified’ volunteers should have relevant notes added to their name. Only your EVC can do this.
5. If a provider is being used, does it say SOE5 and then the current calendar year next to their name? If not you must ask the Provider to complete a new form.

Take the SOE5 form from evolve/resources/forms – do NOT use an old version from your PC, the form changes from time to time.

Once returned from the Provider add it as an attachment.

If it does have the current calendar year next to their name, See Section 7 of this doc for more info on how to read the SOE5

SOE5s should be read and deemed appropriate BEFORE bookings are made of money paid.

It is not necessary to re-attach SOE5s that are already visible on Evolve. The EVC and Head can view the form by clicking on the [Provider's name](#).

6. OR, does the provider have an LOTC badge (it will say so next to their name) if so, an SOE5 is NOT required.
7. Make sure you have selected the correct Provider
8. When attaching your SOP, check the SOP for;
 - Name of VL, dates of activity, name/type of activity. Is it complete? Does this tie up with the visit form?
 - Check the top of middle column, does it reference the current LA Policy (September 2024)
 - Have you used the correct version, day visits, residential, overseas?
9. Other attachments
 - If 'adventurous led by school staff' (Ten Tors, DofE etc) then there needs to be a separate 'adventurous activity RA'. This should address the hazards of the activity (not the group, travel etc. that is on the SOP)
 - If it references the LA policy, is it the correct date?
 - Does the RA fit this visit?
 - Is the date completed 'recent'?
 - Is there a parent letter/s do they belong to this activity?
 - Is there an itinerary (overseas and more complex UK residential)
 - If anything needs explaining or clarifying, go the 'view form' icon top left (purple eye), scroll to the bottom and 'Add Note'. Tick the names of the people you want to see the note
 - Visit Form notes keep all comms in one place for all to see and provides a clear audit trail.
 - If substantive or significant info is shared in person, by phone or email, add a note to the form with a summary of the conversation and the date of conversation

FINALLY, before submitting to the EVC go the 'view form' icon top left (purple eye). This is the view that the EVC, Head and LA will see.

Check it. is it accurate?

Will it all make sense to the EVC/Head?

Are you happy to rely on what you've put (inc your SOP etc) in a Court of Law?

EVCs & HEADS QUICK GUIDE TO CHECKING VISIT FORMS

In my experience it is best to do the check in this order;

1. Visit Name; does it make sense? do you get an idea of what's happening?
2. Go to the bottom and check the visit form notes, is there anything you need to know before you start checking the details?
3. Back to the top, check the adult/student ratios;
 - Non-adventurous day visits 1:15
 - Adventurous day visits led by external provider 1:15
 - Residentials (adventurous & non-adventurous) 1:15
 - Overseas 1:10
 - Adventurous 'LED' by school staff; see ratio matrix in LA Policy. most common are moorland walking which is 1 **qualified** walking leader for every 15 students.
4. Click on [Visit Leader's name](#), check experience of similar visits. Check qualifications are listed on their profile (Awards & Training) if needed.
5. Check the same for other staff/volunteers
6. If a provider is being used, does it say SOE5 and current calendar year next to their name? If not is a new SOE5 added as an attachment? (SOE5s must be for the current calendar year)
7. Click on the [provider's name](#), in the pop-up box, scroll to the bottom to open and read the SOE5, (Word or PDF doc) are you happy with it?
8. OR, does the provider have an LOTC badge (it will say so) if so, an SOE5 is not required
9. Has the form creator listed providers and venues correctly? Do they tie in with the itinerary/plans? In an emergency do you know where they will be?
10. Go to attachments section
Read the SOP, check for;
 - Name of VL, dates of activity, name/type of activity. Is it complete? Does this tie up with the visit form?
 - Check the top of middle column, does it reference the current LA Policy (2024 version)

- Have they used the correct version, day visits, residential, overseas?
- Read the right-hand column, does it fit your expectations for this group doing this activity in this place?
- Have they missed something you would expect?
- IF the VL has taken the SOP template from your 'establishment library' on Evolve you may decide not to read every word of the middle column as they shouldn't have changed it.

11. Check the other attachments

- If 'adventurous led by school staff' (Ten Tors, DofE etc) then there needs to be a separate 'adventurous activity RA'. This should address the hazards of the activity (not the group, travel etc. that is on the SOP)
- If it references the LA policy, is it the correct date?
- Does the RA fit this visit?
- Is it completed by the VL or a team including the VL?
- Is the date completed 'recent'?
- Is there a parent letter/s do they make sense?
- Is there an itinerary (overseas and more complex UK residential) form it do you know what is happening when?
- Other docs you may want to see?

12. Does it meet your school policy? (submission deadlines etc.)

13. If EVC, are you happy it is complete and clear for the Head to check?

14. If HEAD are you happy to say 'yes' to the statements, approve it and if needs be explain your decision to the LA, the HSE, or a Court of Law?

15. If anything is in doubt, seek clarification via the Visit Form notes, this keeps all comms in one place for all to see and provides a clear audit trail.

16. If substantive or significant info is shared in person, by phone or email, add a note to the form with a summary of the conversation and the date of conversation.

17. Could you explain to a Court of Law why you thought it was OK to submit or approve this visit based on the information provided?

If in doubt about anything check with Staff, EVC or LA before approving.