



Achieve Excellence

Exceed Expectations

Ysgol Maes y Felin

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Educational Visits Policy

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Accessible Formats

This document is available in English and Welsh in Microsoft Word and pdf formats in Arial font size 12 as standard. This document is also available in large print. To request a copy of this document in an accessible format contact Mrs. Debbie Dickinson (01352 711366).



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1. Summary of Policy

This document sets out the procedures by which Local Authority and its educational establishments meet the standards set out in the OEAP *National Guidance for Educational Visits*, recognised as *best practice* by the Welsh Government

This school follows the LA procedures for educational visit planning, approval and monitoring by using the EVOLVE on line visit planning and approval system for visits run by school/establishment staff or volunteers.

1. Staff planning an educational visit must ensure that they follow the procedures set out in this policy.
2. Staff must also refer to and follow the relevant guidance (relating to the nature of the visit being planned) as set out in the Outdoor Education Advisers' Panel (OEAP) National Guidance for Educational Visits www.oeapng.info
3. Staff must also refer to their Safeguarding policy, and ensure that they have meet their duties and exercise their functions in a way that takes into account the need to safeguard and promote the welfare of children.

This policy is reviewed every yearly or following any accident / incident on an educational visit.

2. Foreword

Educational Visits form an important part of children's education and the Governors at Ysgol Maes y Felin fully support the staff in ensuring that all children experience these opportunities for enriching their education. There is little doubt that day visits and extended visits to places of interest and centres, such as the outdoor education centres at Nant BH and Glanllyn, provide great benefits in terms of curriculum enhancement, social and life skills. Staff also gain valuable insights into the educational benefits of visits which helps them to promote and develop the interest of the children in a wide variety of ways. The Governors are very appreciative of the time and effort all staff make in ensuring these learning opportunities are available to all. The School ensures that all pupils are able to access such opportunities and where appropriate will support families who may be in financial hardship

Foreword Statutory Head of Education Services

Our educational establishments have a rich and valued tradition of providing exciting and enjoyable educational visits for young people.

Young people benefit enormously from taking part in visits. Whilst enhancing the school/establishment curriculum, participation gives them the opportunity to undertake activities they may not otherwise experience, helps them to develop important life skills, and may provide life-long happy memories.

Staff also benefit from visits. The experience may improve relationships between staff, and staff and young people, increase the variety and interest in their work, and gain the professional development inherent in organising and leading visits.

This document sets out planning and approval procedures that aim to help staff involved in visits to plan and deliver high quality and safe external visits – be it a regular visit to a local park or a three week trek in a remote rain forest. By following these procedures, staff will be supported by the Local Authority in the unlikely event of an incident.

I would like to take this opportunity to express my gratitude to all staff who engage in activities with children and young people for their dedication, commitment and professionalism. Their work ensures that young people across the County are given the opportunity to take part in such beneficial educational visits. These procedures are primarily aimed at supporting them in this valuable work.

Head of Education Services (Chief Education Officer)

3. Roles and Responsibilities

Visit Leader

1. The designated person responsible for the Visit and who will have overall responsibility for the safety and conduct of participants and the Visit Leadership Team.
2. Visit Leaders will need to obtain the Head/EVC's approval for the visit according to school/centre policy;

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3. They will need to obtain LA leader approval if leading any adventurous/ demanding environments visit for which LA approval is required (Please see section on LA Approval)

Key Requirements

- Must be competent to lead, confident and accountable
- Visit leader should have the ability to lead to the level demanded by the visit, and has sufficient relevant experience and knowledge of the activities, the group, and the environments they will operate in.
- Undertake and complete the planning and preparation of the visit, including the briefing of group members and parents/carers;
- Ensure the ratio of staff to young people is appropriate for the environment/activities and the needs of the group;
- Identify significant hazards and safety measures to reduce risk to a tolerable level, and make known to parents, EVC and Head and others the level of residual risk that needs to be managed;
- Have enough information about the young people to assess their suitability for the visit or be satisfied that their suitability has been assessed and confirmed;
- Ensure that all accompanying leaders are familiar with these procedures;
- Make appropriate and adequate preparations for emergencies in conjunction with the EVC
- Carry out dynamic risk management while the visit takes place and consider stopping the visit if the risk to the health or safety of the young people is unacceptable and have in place procedures/alternative plans for such an eventuality

Educational Visit Coordinator

A key element of these procedures is that each school/establishment has a competent **Educational Visit Coordinator (EVC) who has completed the county EVC training course**. Due to the nature of the role the EVC must be an experienced member of staff:

1. **who is part of, or able to influence, the Senior Management Team;**
2. **with sufficient authority to make a judgement call about the competence of any other staff member to lead an off-site visit and to approve or decline visits planned by any staff member;**
3. **The EVC is the routine contact for dialogue with the LA Educational Visits Adviser.**

Key Requirements of the EVC:

- Ensure that all visits are planned and approved in accordance with this policy;
- Support the Head and Governors with approval decisions;
- Assign competent people to lead or otherwise supervise a visit;
- Carry out occasional monitoring of visit leaders to identify further training needs;
- Work with the visit leader to provide parents/carers with information about the visit and obtain the necessary consent from parent/carers;
- Ensure emergency arrangements and contacts are in place for each visit;
- Keep records of individual visits including what worked well, what didn't and any accident/incident reports

Head

1. Heads/Managers should have an establishment visits policy and procedures that conform to and follow the requirements and recommendations of their employer's guidance and ensure that arrangements are in place for the educational objectives of all visit to be inclusive.
2. They will need to ensure that arrangements are in place for the governing body to be made aware of certain visits and ensure that visit arrangements and outcomes are evaluated to inform future visits and staff training needs;
3. Approve visit for **all** educational visit prior to visit date as set out in the table below

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Key Requirements of the Head

- Be aware that the appointment of an Educational Visits Coordinator (EVC) is critical to the implementation of this guidance and should be allowed sufficient time to fulfil the role, including attendance at OEAP-approved training. Heads/Managers may choose to designate themselves as EVC.
- Ensure that proper and effective support structures in the event of emergency or critical incident including means of contacting the relevant officers LA Education Officer (Schools) or Principal Youth Officer (Youth Service) or emergency planning team and arrange for the reporting of accidents and incidents as required. Records of these should be reviewed regularly, and this information used to inform future visits
- Where needed, have access to expert advice from their Education Visit adviser.
- **The Head (Schools) or Head of establishment (non-schools) has responsibility to ensure that any changes to their EVC is notified to the Education Visit Advisor so that he or she can take steps to train their replacement as soon as practicable.**

Governors

1. Members of the Governing Body should view their main role as being **'to enable and ensure'** that staff are fully aware of the employer's responsibilities under Health and Safety Law.
2. That the establishment have formally adopted the Education Visit Policy and that they have a robust system to support the implementation of the policy.

Key Requirements

- They challenge in order to be clear about of how outdoor learning and visits lead to a wide range of outcomes for children and young people and contribute towards establishment effectiveness.
- They ensure that the Education Visit policy and procedures are fully implemented (including emergency procedures – and it supports the principles of inclusion)
- The involvement in Board/Governing Body in the visit approval process is clear and approval and notification procedures operate effectively
- Ensure there is a trained EVC who meets the employer's requirements, with a sufficient time allowance to fulfil the role and training to support the planning and delivery of visits and outdoor learning.
- There are monitoring procedures in place, activity is evaluated, good practice is shared and any issues are followed up to comply with statutory and employer's requirements.

Education Visit Advisor

1. The Educational Visits Advisory Service fulfils the following statutory Council functions to support the LA to meet its legal responsibilities and powers with regard to off-site and educational visits delivered to young people by its employees.
2. Provide expert advice on safety and quality of educational visits and on risk management in the context of all educational visits,
3. On behalf of the Local Authority approve (or disallow) visits for which LA approval is required these including adventure activities, expeditions and overseas visits.
4. Monitor standards of Health and Safety management in off-site activity and educational visits, including observing activities and visits
5. Ensure that adequate and appropriate training is available and taken up by relevant employees.

Key Requirement

- Ensure that EVCs, visit leaders, other school staff and other adults involved in educational visits are assessed as competent in their specific tasks.
- Ensure that LA guidance on Health and Safety of pupils on educational visits is provided to all LA educational establishments and is kept up to date with current best practice, including lessons learned from incidents in Wales and beyond.
- Fulfil the LA's approval role for specified categories of educational visits.

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- Inform the LA and Board of Governors of noncompliance or visit that have not been approved by the LA.
- Verify the competence of LA employees who wish to lead visits in any of the areas or activities for which LA approval is required
- Offer relevant training, advice and support to all educational establishments on the Health and Safety of pupils on educational visits and other matters relating to safety and quality in Outdoor Education.

4. Approval and notification requirements for visits

All visits must be approved as set out in the table below. LA approval decision for visits will be given via the Evolve system. Visit **MUST NOT PROCEED** UNTIL approval has been given. Visit submitted outside of the timescale set out in the table below run the risk of not being approved. **Details on specific**

Procedures for the types of Visit and relevant forms can be found on

<https://hwbwave15.sharepoint.com/sites/665/nwoes/SitePages/General-Documents.aspx>

Visit type	Planning and approval required
Routine visits (as defined in Educational visits procedures document)	Planning Visit planned on routine visit planning form Approval By the Head before the visit takes place (Heads may give blanket approval for a member of staff to lead routine visits)
<ul style="list-style-type: none"> • Non-routine visits • Overnight visits 	Planning Visit planned using the EVOLVE system by Visit Leader / Submitted by EVC Approval <ul style="list-style-type: none"> • By the Head on the EVOLVE system before the visit takes place using their PIN number • Visits that have not been approved by the Head on the EVOLVE system MUST NOT TAKE PLACE.
A visit involving any of the following elements: <ul style="list-style-type: none"> • Demanding environments (as defined in table 3 in the Educational visits procedures document) • Adventure activities (as defined in table 4 in the Educational visits procedures document) 	Planning Visit planned using the EVOLVE system / Submitted by EVC Approval <ul style="list-style-type: none"> • Approved by the Head on the EVOLVE system using their PIN number at least 14 days before visit start date. • LA approval required –EVOLVE automatically applies for this after the Head approves the visit. • Visits that have not been approved by the LA on the EVOLVE system MUST NOT TAKE PLACE
Overseas visits and expeditions organised through an independent provider (<i>i.e. skiing, sports tours, cultural/ foreign language visits and expeditions involving trekking or other adventure activities</i>)	Planning Initial approval before booking using the Outline Approval for Overseas Visits form (available on EVOLVE forms section) submitted to the LA Following initial approval granted, Visit must be planned by the Visit Leader using the EVOLVE system / Submitted by the EVC Approval LA Approval is in two stages: <ul style="list-style-type: none"> • Initial approval for the planning phase will be given at least 3 months prior to visit. • Head approval on the EVOLVE system at least 42 days before the visit • LA final Approval at least 28 days before the visit – Evolve automatically applies for this after the Head approves the visit using their pin. • Visits that have not been approved by the LA on the EVOLVE system MUST NOT TAKE PLACE.
Duke of Edinburgh Award expedition	Planning Visit planned using the EVOLVE system Approval

- | | |
|--|--|
| | <ul style="list-style-type: none">• Approved by the Head on the EVOLVE system using their PIN number. at least 14 days before visit start date.• LA approval required –EVOLVE automatically applies for this after the Head approves the visit• Visits that have not been approved by the LA on the EVOLVE system MUST NOT TAKE PLACE. |
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5. Summary of Procedures

Parent / carer consent

Consent is required for all offsite and educational visits. Anyone organising an off-site visit should:

- 1. Provide parents with sufficient information to make an informed decision about the participation of their child. Such information may be given in a variety of ways, as the information needed by parents will depend on the nature and complexity of the visit**
 - For routine visits **those listed on your Routine Visit Consent Form**, blanket consent is obtained.
 - For non-routine visits i.e. **Overnight/adventurous etc.** consent is obtained for each visit (or series of repeated visits) using a **Non-routine Visit Parental Consent Form or Adventure Activities Consent form**. An example of a non-routine visit parental consent form can be obtained from the EVOLVE system by clicking on resources and then 'forms'
 - With appropriate security measures in place, parents can give consent electronically - e.g. by email, text, website or apps. Online systems that provide the option for visit-specific e-consent should have the facility for parents to confirm that they have been fully informed, and when and by whom the consent was given. Systems that use a hyperlink or attachment facility enable the direct connection between consent and information about the visit.
 - Where it is not possible for parents to update information electronically, as part of the consent process, it would be sensible to include a statement informing the school of any changes to my child's medical condition or individual needs (including any emotional wellbeing or mental health issues which may affect their participation in the visit), agreement to medical treatment and any changes to emergency contact numbers
 - If parents/careers withhold their consent the young person must not be taken on the visit but the curricular aims of the visit should be delivered to the young person in some other way wherever possible. If the parents/careers give a conditional consent the Head will need to consider whether the young person may be taken on the visit or not.

Inclusion

The overarching principle is that all pupils should be included in all education activities and experiences. The law requires that 'reasonable adjustments' are to be made to include pupils with additional support needs. This might include amendments to the programme, additional staffing etc. The Health and Safety of all pupils and staff on visits must also be considered.

When a visit or activity is being planned, all reasonably practicable measures must be taken to include all young people. Every reasonable effort should be made to find a venue and activities that are both suitable and accessible and that enable the whole group to participate fully and be actively involved. The principles of inclusion should be promoted and addressed in policy and practice, ensuring:

- An entitlement to participate.
- Accessibility through adaptation or modification, including the provision of auxiliary aids and services.
- Integration through participation with peers.

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Sometimes it may not be possible to make reasonable adjustments to include a young person in a specific visit or activity, nor to provide the whole group with a suitable alternative, perhaps because of a severe disability. It is not necessary to deprive the rest of the group of worthwhile opportunities, if it is genuinely impossible to find a suitable way of including everyone, or after putting in additional support the Risk management plan still deems that pupils and staff may still be at risk

Consideration must be given to the provision of a suitable alternative. The burden of proof is on the establishment, to show that what happened was for a reason other than unfair discrimination.

- Any adjustments that are made in order to include a disabled young person should not impinge unduly on the planned purpose of the activity
- A decision to exclude a young person should not be taken lightly, and only after consultation with those who have responsibility for the young person, including (as appropriate) the head, EVC, Visit leader, Support staff, Parents, any third party provider, Education Visits Advisor and possibly their GP.

Charging for Activities

Schools and Education Establishments must take account of the law relating to charging for school activities, as set out in the Education Act 1996. Schools and local authorities **must not** charge for:

- Education provided during school hours
- Education provided outside school hours if it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.
- Transport provided in connection with any educational visit of this type.
- Supply teachers to cover for teachers who are away from school on a visit

Schools **may** charge for optional extras, which include, education provided outside of school time that is not:

- a) Part of the Curriculum.
- b) Part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school.
- c) Part of religious education.
- d) Board and lodging for a pupil on a **residential visit**, except to parents in receipt of certain benefits (broadly equivalent to those that qualify children for Free School Meals).
- e) Extended day services offered to pupils (e.g. activity clubs)
- f) Schools must inform parents on low incomes and in receipt of relevant benefits of the support available to them when they ask for contributions.

Using External Provider – pre-booking checks

For any off-site visit, the visit leader should check that the location and activities offered are educationally suitable for the group and will meet the aims of the visit.

- Check that any provider offers good value for money by comparing with other similar providers. Remember that there is no substitute for first hand, up to date information gained by a pre visit by staff.
- When using a specialist venue or activity provider please apply the following guidance before signing any booking form or contract:

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LOtC Quality Badge If the provider has the **LOtC Quality Badge** (Learning Outside the Classroom Quality Badge accreditation) The Quality Badge providers have pledged to engage in an ongoing process to sustain high-quality learning outside the classroom and who have demonstrated that they meet six quality indicators

- has a process in place to assist users to plan the learning experience effectively;
- provides accurate information about its offer;
- provides activities, experience or resources which meet learner needs;
- reviews the experience and acts on feedback;
- meets the needs of the users;
- has safety management processes in place to manage risk effectively.

Providers that hold the LOtC Quality Badge are not required to provide schools with additional information on their Safety Management Systems or complete the Provider form

- **Providers who are not LOtC holders will need to complete the Providers Form** (which can be downloaded from the EVOLVE system's Forms section)
- Check that this has been satisfactorily completed by the provider before you book. This requires them to confirm that they have risk assessments in place for all activities/services that they provide and that these are available to view at the premises on request.
- Please note that there is no need to obtain copies of the provider's risk assessments.
- Seek specialist advice on any concerns arising from the provider's responses by contacting your LA Education Visits Adviser.

Local Authority Leader Approval

Who needs LA leader approval?

Any school staff or volunteers who wish to lead any activity or visits in any of the demanding environments (listed in Table 3 these including Field Studies) or adventurous activities (listed in table 4) in the educational visit procedures document which can be found on Evolve under Policy / Procedures must first be confirmed as technically competent to lead the activity by the Education Visits Adviser.

LA Leader Approval Requests

The Person requiring approval **MUST** make a Leader Approval Request via their own EVOLVE account, these cannot be made by another person (EVC). To do this:

- EVOLVE Home Page
- Click the Blue Icon with two white Person
- Click on Awards and Training bottom left
- Click the Blue + button next to LA Leader Approval requests and complete the two sections:
 - a. Details of the activity you are applying for
 - b. A summary of your recent experience
 - c. click continue
- Then Click on Blue + button Next to My Awards – browse your files and upload all relevant qualifications including an in date first aid certificate – click continue **Your Head will then approve your request and then the LA. Approval lasts for 3 years after which you will need to resubmit in the same way.**

Approval is normally given only if the following conditions are met:

- The leader has completed a training course in the relevant NGB leadership award where one exists (or has undergone other appropriate training)
- The technical adviser has made a practical assessment of the leader and can confirm that they are operating at the standard of the relevant NGB leadership award or at a suitable level for a site-specific approval to be given.

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(To arrange technical adviser approval the EVC must identify an appropriate technical adviser who is willing to make a signed statement of competence for the visit leader)

Depending on depth of experience and technical skill, leaders may be given approval to lead either:

- the activity/activities at specific, named venue(s) at any time for the duration of the approval period;
- or
- the activity/activities at all venues that are within the remit of their competence at any time for the duration of the approval period.

Joint visits or collaborative visits planned with or by another establishment or organisation

Any visit or activity involving young people from your school/establishment, or where young people have been recruited through your school/establishment should be treated as one of your own visits **even if another school/establishment or external provider is taking the lead role in organising the visit.** Examples include:

- Sports fixtures/tours where your school/establishment has made young people/parents aware of the opportunity but where the tour is being staffed by other adults e.g. Sports coaches, LA staff, Urdd officers or similar.
- Collaborative visits with another school/establishment
- DofE Expeditions where young people from your establishment are joining another establishment's expedition

For these visits, the young person's EVC and Head **must be able to evidence that they have:**

- Ensured that all aspects of planning for the visit meet the county requirements for visit planning and approval (**Please note: another school/establishment may carry out this planning and approval if they are taking the lead role but if this is the case, the visit plan must include all young people and staff attending the visit from all schools/establishments involved and you must view and approve the visit plan**)
- Each participating school should be sufficiently involved in planning for the visit to ensure that the risk management and pastoral care arrangements (including an appropriate level of 24/7 supervision)
- Checked that the planned activities are appropriate for the young people from their establishment
- Ensured that parents are made aware of the arrangements for supervision and the activities planned and have given their consent to this
- Ensured that the supervisory staff for the visit are made aware of any relevant additional needs (**including medical/dietary/behavioural**) for the young people taking part from their establishment
- Ensured that appropriate support will be provided by the visit leaders to manage any additional needs effectively
- Ensured that they can be contacted in the event of an incident, accident or other emergency

Guidance of the Management of cross county collaborative visits

Please read and follow the specific guidance on Cross County Collaborative Visits and Regional visits e.g. **Ski Courses and Regional Sports Teams** which can be found on SharePoint to ensure that best current practice is followed on collaborative visit.

<https://hwbwave15.sharepoint.com/sites/665/nwoes/SitePages/General-Documents.aspx>

Blanket approval

Blanket approval may be given:

- by Heads for staff to run routine visits
- by the LA for those staff who have gained LA leader approval o

For visits that have been given blanket approval, the visit leader and EVC must ensure that relevant

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information is left with the school/establishment emergency contact including details of the venue, activity, group, transport, start/finish times and other relevant information for **each** visit.

Arrangements for overseas visits and overseas expeditions

Overseas Visits

Overseas visit require a longer planning, preparation period and fall into two broad types:

- Complete packages arranged and delivered by an external provider.
- Visit led by the establishment's own staff, or may involve input from a variety of partners and providers in the UK and overseas, but the overall delivery is co-ordinated by the establishment rather than by an external provider

In either case it is essential that an initial LA approval must be obtained before booking confirmation. Initial LA approval can be sought by completing and sending the overseas visit approval form to the Education Visit Adviser. **Initial approval for the planning phase will be given at least 3 months prior to visit.**

- **HEAD MUST** approve on the EVOLVE system **AT LEAST 42 days** before the visit.
- Final LA approval for the visit on the EVOLVE system at least **28 days** before the visit start date.

Overseas Expeditions - Please refer to the **Guidance on Overseas Expeditions** which can be found on <https://hwbwave15.sharepoint.com/sites/665/nwoes/SitePages/General-Documents.aspx> .

There are no UK statutory standards regulating Overseas Expedition providers but the following are relevant:

- The Learning Outside the Classroom (LOtC) Quality Badge for Overseas Expeditions gives assurance of both quality and safety, and is evidence that the provider claims compliance with British Standard BS 8848:2014. It does not involve any inspection of overseas work.
- British Standard BS 8848: 2014 "a specification for the provision of visits, fieldwork, expeditions, and adventurous activities outside the United Kingdom" is a non-statutory standard against which providers can declare their conformity following self-assessment or assessment by an external body (there is no regulation of the assessing bodies). Any provider claiming to conform to BS8848 who was found not to provide what is required by the standard would be in breach of contract.
- The school / Education Establishment **MUST provide parents with full information** about the visit so that they can make informed decisions when consenting to the arrangements, including any "Plan B" alternatives. A pre-visit parental briefing session is good practice. It will provide an opportunity for parents to ask questions.

Educational Visit and the threat of terrorist attacks

A heightened state of vigilance continues to be required for all educational visits. We advise to exercise caution in public places. For up to date guidance please read the Guidance document which can be found on Sharepoint

<https://hwbwave15.sharepoint.com/sites/665/nwoes/SitePages/General-Documents.aspx>

Schools should consider a risk / benefit analysis of trips:

- a. Why? - Is it part of the curriculum /necessary or a reward trip?
- b. Where? The Environment - Urban/cities/theme parks/outdoor activities
- d. Transport? Public/Private/walking/
- c. Visit Programme and Learning Outcomes

DofE Award groups / Unaccompanied Expedition groups

Anyone planning a DofE Award expedition or unaccompanied expeditions should read the **Guidance for unaccompanied Expeditions on <https://hwbwave15.sharepoint.com/sites/665/nwoes/SitePages/General-Documents.aspx>** as **this document is intended to set a benchmark for good practice for all involved and to ensure that the Expedition meets the requirements of the Local Authority.**

It is best practice to have a lead Expedition / Visit leader who holds the overview of the whole expedition and an appropriately competent deputy. Schools need to ensure that staff involved in remote lone working during expeditions are competent and aware of the safety implications including emergency procedure and relevant issues.

Media Considerations

It is strongly recommended that there is control over indiscriminate and potentially damaging use of mobile phones and social media by groups on educational visits. This is especially important when dealing in the unlikely and unfortunate event of an incident / accident as this may impede the support of dealing with an emergency.

6. Record keeping/ Monitoring

Routine visits

A copy of the completed *Routine visit planning form* should be kept on file for 5 years for each routine visit **(electronic file storage or hard copy are both acceptable).**

Visits planned on EVOLVE

The EVOLVE system acts as a record for any visit planned and approved on the system.

Schools/establishments therefore only need to retain the following details for any particular visit:

- List of participants
- Parental consent forms (**NOTE: these can be destroyed 3 months after the visit if no accidents or incidents have been reported**)

Where an accident or incident has been reported the school/establishment should:

- Retain the parental consent form for the pupil(s)/young person(s) involved.
- If there has been an accident/incident on a visit, schools/establishments must ensure that the LA is notified according to LA procedures. The LA will keep accident/incident records until the young person reaches age 21 (or for 3 years in the case of an adult).
- Schools/ establishments therefore do not need to retain records of accident/incidents reported to the LA unless they wish to do so for their own purposes.
- If a visit leader or school/ establishment receives notification of a claim they should not respond directly but should pass the details to the LA claims manager/insurance section.

In addition, schools/establishments should archive in the school/ establishment records a copy of their:

1. Educational visits policy – dated so that the version current at the time of any visit can be traced;
2. Standard risk management procedures dated as current at the time of the visit;
3. Records of staff competence and training (perhaps as part of the appraisal/performance management records). This information should be kept for 5 years after which it may be destroyed.

Monitoring

Internal monitoring by the Head/EVC

The Head/EVC must monitor visit leaders from time to time to ensure compliance with school/establishment policy.

Monitoring by the Head/EVC should include:

- scrutiny of standards of visit planning and organisation as part of the visit approval process
- occasional observation of visit leadership

Following any observation of visit leadership it is good practice to provide the visit leader with verbal and written feedback and recommendations for further training if necessary. A copy of the observation report should be given to the visit leader and another copy kept on file by the school/establishment.

Monitoring by the LA

The LA will monitor schools/establishments on a 5 year cycle to ensure compliance with LA guidance. The LA will contact EVCs to notify them of an upcoming monitoring visit.

7. Incident Management

Emergency action flowchart for Visit Leaders and School Base Emergency Contacts

- This sections sets out the action to be taken, in the event of an Emergency /Critical incident on an educational visit.
- Schools/ Establishments are provided with emergency action flowcharts and this must be carried by all visit leaders taken part in any offsite activity or visit.

Definitions

- Emergency incident on an educational visit is defined as an incident requiring the emergency services that affects participants on an off-site visit organised by a school or other LA service for young people.
- Critical incident is an incident which goes beyond the coping mechanisms of the Visit Leadership Team and the Establishment

1. **Incident:** a situation dealt with by the Visit Leader, who remains in control and can cope
2. **Emergency:** an incident that overwhelms the coping strategies of the Visit Leader so that they refer to the Emergency Contact for help
3. **Critical Incident:** an incident that meets the definition and is probably overwhelming the coping strategies of both the Visit Leader and the school's Visit Emergency Plan.