

# Guidance for Off-Site Activities (and related activities with National Guidance & EVOLVE



| Policy Schedule | Details |
| --- | --- |
| **Policy owner and lead** | S(OD): HR: Health and Safety |
| **Consultation** | Trade unions: January 2024  CCF: January 2024  CMT: n/a |
| **Equality Impact Assessment** | n/a |
| **Approving body** | H&S Board |
| **Date of approval** | 20th October 2023 |
| **Date of implementation** | 25th October 2023 |
| **Version number** | 2 |
| **Related documents** | Codes of Practice 001, 010, 018, 027, 033, 034 |
| **Review interval** | Biannual (2 Yearly) |

## Contents

| **Section** | **Page number** |
| --- | --- |
| 1. **Introduction** | **3** |
| 1. **Legal** | **3** |
| 1. **What is Evolve?** | **3** |
| 1. **Roles and responsibilities** | **4** |
| 1. **Training** | **4** |
| 1. **First steps** | **5** |
| 1. **Planning required by the visit leader** | **6** |
| 1. **Risk assessment** | **8** |
| 1. **Other documentation** | **9** |
| 1. **Evolve entry** | **9** |
| 1. **Further information** | **10** |

## Introduction

* 1. Offsite activities is defined as “Pupils going ‘beyond the school gates’ to pursue an activity organised by the school. Activities may take place during or after the school day, at weekends or in school holidays and will have an educational basis” Source: SCE Policy, Procedures and Guidance for Outdoor Education and School Off-site Visits.
  2. SBC acknowledges the immense value of off-site visits and related activities to young people and fully supports and encourages those that are well planned and managed.
  3. SBC has adopted the Outdoor Education Advisers Panel ‘[National Guidance’](http://www.oeapng.info).
  4. SBC uses the web-based system EVOLVE to facilitate the efficient planning, management, approval and evaluation of visits.

## Legal

### Legal responsibilities

The Health and Safety at Work etc Act 1974 places overall responsibility for health and safety on educational visits with the employer.

* + 1. SBC is the employer for Local Authority (LA) maintained schools (Community and Voluntary Controlled), maintained nursery schools, pupil referral units, statutory youth service, Looked after Children and other LA services/settings. These establishments must adhere to this requirements document.
    2. For academies, foundation, independent, and voluntary aided schools, the employer is usually the governing body or proprietor. These establishments are not obliged to use the guidance of the LA.

### Common law duty of care

* + 1. A teacher has a ‘duty of care’ for young people under his/her supervision.
    2. Higher duty is expected by teachers as a result of their specialised knowledge.
    3. The age and ability of the student together with the nature and location of the activity help determine the degree of supervision required.

## What is Evolve?

* 1. Evolve is an online educational visits system which is a nationally recognised system.
  2. The system provides a logical process for organising a school trip and provides a formal record of approval.
  3. **All trips** should be added to Evolve i.e.
     1. Weekly swimming classes
     2. Trips to London
     3. Museum trips
     4. Residential
     5. Rock climbing to white water rafting
     6. Activity centres through to geography field trips (internally organised)
     7. Camping
     8. PE/sports after school clubs.

## Roles and responsibilities

### Visit Leader

* + 1. Organises the trips.
    2. Ensures relevant documentation is collated and shared with staff/parents/pupils.
    3. Completes the ‘SBC FORM 031D Offsite Visit Planning Checklist.’
    4. Ensures all the relevant information is included on the Evolve trip entry and submitted to the relevant person for approval (EVC/Headteacher/SBC H&S).

### EVC

* + 1. Ensures documentation is correct and complete (all trips).
    2. Ensures the ‘SBC FORM 031D Offsite Visit Planning Checklist’ has been completed and the relevant evidence is available and sufficient.
    3. Reviews and approves (local lower risk trips).
    4. The EVC should be specifically competent, ideally with practical experience in leading and managing a range of visits similar to those typically run by the establishment.
    5. The EVC should support the head of establishment in ensuring that competent staff are assigned to lead and accompany visits, give approval, and make decisions when necessary.
    6. The EVC must ensure that a policy is in place for educational and off-site visits, and that this is updated when necessary. This should be readily available to staff via their establishment’s own EVOLVE Resources section.

### Headteacher

* + 1. Ensures documentation is correct and complete (all trips).
    2. Ensures the ‘SBC FORM 031D Offsite Visit Planning Checklist’ has been completed and the relevant evidence is available and sufficient.
    3. Reviews and approves (local lower risk trips).

### SBC H&S Team

* + 1. Responsible for reviewing and approving offsite activities (Overseas, residential, adventurous, adventurous led by establishment staff, and trips to London) that have been entered onto Evolve.
    2. SBC H&S will review all entries and relevant documentation and either:
       1. **Approve** (trip has been approved and no further action is required).
       2. **Process** (trip will not be approved due to insufficient time to review and process therefore school will accept liability if going ahead with the trip).
       3. **Add Notes/comments** (further information may be required or the school may have to review additional considerations).

## Training

### Offsite activities leader training

* + 1. This course will enable individuals to understand what is required when preparing and undertaking offsite activities and how to devise the risk assessment.
    2. Recommended for Visit Leaders, EVC’s and Headteacher’s (delivered by SBC H&S Team).

### EVOLVE

* + 1. This training covers the use of the EVOLVE software package to enable individuals to use the system and manage the system in their buildings/work location/ school.
    2. Recommended for all staff/EVC’s organising off-site activities and delivered by SBC H&S Team.

### EVC training

* + 1. This course aims to equip staff with the key requirements to become a competent Educational Visit Co-ordinator. The course outlines key considerations in planning an educational visit, updating participants with current good practice in the supervision of young people.
    2. Recommended for all EVC’s organising off-site activities as soon as possible after appointment and delivered by EVOLVE. Note this is organised by the SBC H&S Team with an external provider where there is a demand as there is additional costs involved.

### Risk assessment and safety inspection

* + 1. This course will provide you with the knowledge to understand how to write and review risk assessments.
    2. Recommended for all staff/EVC’s organising off-site activities and delivered by SBC H&S Team.

For further information please contact [healthandsafety@slough.gov.uk](mailto:healthandsafety@slough.gov.uk).

## First steps

* 1. When an offsite activity is being considered the visit leader must:
     1. Seek approval from Head/Governors (and SBC if required) prior to making any financial commitment.
     2. Consider and determine how the offsite activity will be funded – via school funding/voluntary contributions.
  2. The Headteacher and EVC must ensure the visit leader is
     1. approved to carry out the visit
     2. Has planned and prepared for the visit and assessed the risks
     3. Has defined the roles and responsibilities of other staff and pupils and ensure effective supervision of what they do.
  3. Competence is key and the EVC and/or head of the establishment must consider the following when assessing the competence of the visit leader;
     1. What experience has the leader in leading or accompanying similar or other visits? (check staff History on EVOLVE).
     2. Is the leader competent in planning and managing visits?
     3. What are the leader’s reasons for undertaking the visit?
     4. Is the leader an employee of the local authority?
     5. Does the leader have the ability to manage the pastoral welfare of participants?
     6. Does the leader exhibit sound decision making abilities?
     7. What experience has the leader of the participants he/she intends to supervise?
     8. What experience has the leader of the environment and geographical area chosen?
     9. Does the leader possess appropriate qualifications?
     10. If appropriate, what is the leader’s personal level of skill in the activity, and fitness level?
     11. If leading Adventurous Residential and Overseas activities, has this been ‘approved’ by the LA?
     12. Is the leader aware of all relevant guidelines and able to act on these?
     13. Is the leader good in dealing with emergency situations? Does he or she have any experience and is able to remain calm in such a situation.
  4. Further information is available on EVOLVE: ‘[Assessment of Competence](https://www.google.com/url?q=http://oeapng.info/download/1084/&sa=U&ei=BQR6UqCqENPw0gWGkICACw)’ in [National Guidance](http://www.oeapng.info) and Diagram: [Planning with EVOLVE](http://www.national-library.info/download.asp?fileid=1093).

## Planning required by the visit leader

Preparation and planning are key to a successful and safe school visit. Consider and prepare the following:

* 1. Read your establishments Offsite Activities Policy.
  2. Read the SBC COP 031 Offsite Activities.
  3. Read and complete FORM 031D Offsite Visit Planning Checklist.
  4. Read the relevant guidance for the type of activity/trip (Evolve Library and Outdoor Education Advisers Panel ‘National Guidance’).
  5. What type of offsite activity is the trip?
  6. Who will need to approve the trip? (SBC H&S/Headteacher/EVC)?
  7. Attendee group and total number (age groups/Key Stage levels).
  8. Do you know who the schools EVC is?
  9. Staff numbers/names
     1. Are adequate staffing numbers available, taking into account any special needs?
     2. Have you checked the advice on typical young person?
     3. Are staff competent for their roles on the visit?
     4. If establishment staff are planning to lead activities which require LA approval, have they obtained LA leader approval?
     5. Are any of the activities offered licensable under the Adventure Activities Licensing Regulations, 1996?
     6. If so, is the provider licenced by the Adventure Activities Licensing Authority to provide these?
     7. Does the visit involve young people working without the direct supervision of staff at any time?
     8. What is the supervision ratio?
     9. Are there any medical conditions?
  10. Volunteer’s numbers/names
      1. Are voluntary helpers being used?
      2. Are they appropriate?
      3. Are they insured, by being entered on the school/centre list of voluntary helpers?
      4. Are they aware of their responsibilities?
      5. Is a police check necessary for your helpers under the Child Protection Act?
  11. LOTC provider – add their details on Evolve. If the provider is Non LOTC then get them to complete the provider form.
  12. Address of provider.
  13. Travel arrangements
      1. Coach (documents required - risk assessments, insurance, maintenance, drivers suitability, drivers hours, adequate stops, eating and care arrangements en route are required).
      2. Establishment mini-bus (documents required - risk assessment, drivers suitability/health, pre-use checks, driving license, Minibus MOT/maintenance/insurance are required).
      3. Walking (add details to risk assessments)
      4. Trains (add details to risk assessments)
      5. Planes (add details to risk assessments)
      6. Automobiles (documents required - risk assessment, drivers suitability/health, pre-use checks, driving license, car MOT/maintenance/insurance).
      7. Ferry (add details to risk assessments)
  14. Purpose of the activity
      1. Where is the visit taking place and when?
      2. What is the purpose of the trip or visit (have clear aims and objectives) Is it linked to the curriculum
      3. Are venue, activities and time of year appropriate to aims and age/ability of group?
  15. Visit specific information
      1. Where are you going and for how long?
      2. Departure time and date from school
      3. Arrival time and date to school
  16. Exploratory visit
      1. Do you need to visit?
      2. Has the school visited before?
      3. (suitability/fire precautions and certification/fire drill/young people security etc)
      4. Can you speak to another school that may have recently visited?

## Risk assessment

A risk assessment of the trip is required by the establishment. When undertaking the risk assessment the following needs to be considered;-

* 1. School/venue/travel (dependant on each activity and trip)
  2. Venue and travel related risks and hazards
  3. What are the main hazards?
  4. Ensure all risks and hazards are proportionate to the trip
  5. Are the main hazards covered by the school/centre risk assessment for this type of activity/visit?
  6. If there are additional hazards and safety measures above and beyond the risk assessment, have you completed a specific risk assessment that details these additional risks and safety measures?
  7. Have you taken account of any special needs of young people/staff?
  8. Have you made all staff (including independent providers) aware of relevant special needs?
  9. Have you planned 'Down-time' arrangements?
  10. Have you made appropriate medical arrangements, including first aid?
  11. Have you planned what to do in the event of an emergency during the visit?
  12. Have you established appropriate emergency contacts (24 hrs) with your base establishment and parents/carers? County press/media officer?
  13. Have you set up effective communication procedures with the group?
  14. Have you discussed and shared these with other leaders and young people with suitable records?
  15. What is the process for reporting any accidents and incidents?
  16. Are there any special needs, special dietary requirements?
  17. Ensure your risk assessments are;-
      1. Recorded, signed and dated
      2. Publicised – get pupils involved in the process. Parents can request a copy of your risk assessment.
      3. Ensure staff are aware and this is recorded
      4. Provide Instruction, Information, Training and Supervision
      5. Implement control measures
      6. Monitor and keep under review
  18. Common gaps in risk assessments are;
      1. Forgetting the BIG risks
      2. Not getting pupils involved
      3. Not having a plan to get home OR to stay safe
      4. Plan B - this is good forward planning always include alternative plans in case the itinerary needs to be changed
      5. Not considering pupils with additional needs
      6. Staffing levels – check the policy
      7. Do not assume any knowledge – state it!
      8. Record what you’ll do if it an unexpected event happens.

## Other documentation

There is no need to upload the following documents however, the Offsite Activity Visit Checklist must be completed to state that the required documentation has been devised (where appropriate) as part of the planning:

* 1. Letter to parents
  2. consent forms for each activity or whole trip listing all the activities
  3. presentation to parents (residential trips)
  4. equipment list
  5. clothing list
  6. Agreed standards of behaviour and conduct
  7. mobile phone policy
  8. School insurance documents provided to parents
  9. information provided to staff
  10. information provided to pupils
  11. Itinerary (evidence also required when submitting on Evolve)
  12. Emergency card/contact details
  13. First aid information and provision
  14. First aid qualifications for staff undertaking trip
  15. Medical forms for those attending
  16. Residential trips (allocation of pupils/accommodation/activity)
  17. Dietary requirements
  18. PEEP form to be provided to venue for pupils/staff that require assistance in the event of a fire
  19. Pupil register
  20. Exploratory visit record of findings.

## Evolve entry

* 1. Once all the planning and preparation is completed (or nearly completed), it is recommended that the offsite activity is entered onto Evolve (and the relevant documentation) to begin the approval process.
  2. Ensure you allow a **minimum** of 10 working days prior to the offsite activity taking place to allow SBC H&S to review and provide any feedback if required.
  3. For overseas visits – notify SBC H&S on Evolve at least 1 month prior to the activity.
  4. Documents to upload onto Evolve:-
     1. FORM 031D Offsite Visit Planning Checklist
     2. Relevant risk assessment/s
     3. Itinerary.

## Further information

* 1. SBC information and forms to support this code of practice;-
     1. FORM 031A Emergency Card

This form provides a template which outlines the emergency details for any offsite activity.

* + 1. FORM 031B Off-site Activities Provider Form

This form is to be used and uploaded onto EVOLVE if the provider does not have the LOtC Quality Badge.

* + 1. FORM 031C Pupils Code of Conduct for School trips

This form is a template that outlines the schools expected behaviour during an offsite activity.

* + 1. FORM 031D Offsite Visit Planning Checklist

This form is to be used and uploaded onto EVOLVE as evidence that the necessary arrangements are in place for the offsite activity.

* + 1. FORM 031E Event Specific Note

This form is a template which outlines event issues, how to manage the issues and who was informed.

* + 1. FORM 031F Offsite Medical and Consent Form

This form is a template medical consent form to be completed by parents/guardians.

* + 1. FORM 031G Evaluation Form

This form is a template evaluation form to be completed after the offsite activity has occurred.

* + 1. INFO 031A EVOLVE Staff Guide

This is a guide from EVOLVE which advises staff how to use the system.

* + 1. INFO 031B EVOLVE EVC Guide

This is a guide from EVOLVE which advises EVC how to use the system.

* + 1. INFO 031C EVOLVE Head Teacher Guide

This is a guide from EVOLVE which advises Head Teacher’s how to use the system.

* + 1. INFO 031D Approval of Offsite Visits

This provides an outline of the EVOLVE approval process.

* + 1. INFO 031E Types of Offsite Activity visits

This provides an outline of different activities and what to consider.

* + 1. INFO 031F Letter for staff car use

This is a template letter to send to staff using their own car for offsite activities.

* + 1. INFO 031G Guidance on Funding

This is information outlining the guidance on funding for offsite activities.

* + 1. INFO 031H Further Guidance

This provides further guidance on all requirements for planning a safe offsite activity.

* 1. [OEAP National Guidance](http://www.oeapng.info/)
     + - 1. [Refer to: ‘](http://www.oeapng.info/)[[Planning Basics](http://www.oeapng.info/)](http://oeapng.info/wp-content/uploads/downloads/2012/04/5.2b-Planning-Basics-final-1.pdf)[’ and ‘](http://www.oeapng.info/)[[Checklists](http://www.oeapng.info/)](http://oeapng.info/downloads/model-forms-mind-maps-and-checklists/)[’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/) and](http://www.oeapng.info/) [[Checklist - Management Board/ Governing Body](http://www.oeapng.info/)](https://oeapng.info/download/1096/) [for the Governor Checklist.](http://www.oeapng.info/)
       1. [[Planning and Leading Visits and Adventurous Activities](http://www.oeapng.info/)](https://www.rospa.com/rospaweb/docs/advice-services/school-college-safety/school-visits-guide.pdf)
       2. [[OEAP National Guidance Updated Documents](http://www.oeapng.info/)](https://oeapng.info/ng-documents-updated/)
       3. [[OEAP National Guidance Head Manager](http://www.oeapng.info/)](https://oeapng.info/head-manager/)
       4. [[OEAP National Guidance Model Forms, Mind Maps and Checklists](http://www.oeapng.info/)](https://oeapng.info/downloads/model-forms-mind-maps-and-checklists/)
  2. Evolve national guidance for specific trips.

## Document Control

| Issue | Date | Changed by | Updates |
| --- | --- | --- | --- |
| 1 | 01.12.2014 | Vicki Swift Senior H&S Advisor | First Published |
| 2 | 11.09.2023 | Georgina Watson H&S Professional | Document reviewed and made clearer on what is required from schools. Documents made accessible and additional forms and info sheets added. |