

Ormiston Forge Academy

# Off Site Visits Policy

May 2017



Approved by the SLT under powers delegated by the Governors Finance and General Purposes Committee: **May 15<sup>th</sup> 2017**

Review period: **May 2019**

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

### **Policy Objectives**

- To ensure that every young person has the opportunity to benefit from off site visits and off site activities.
- To ensure all off site visits and off site activities are safe, purposeful and appropriate to meet educational needs of young people taking part.
- To enable the OFA to identify appropriate functions, responsibilities, training, support and monitoring for all Governors, Heads, staff, volunteers, young people and providers involved in off site visits and off site activities.
- To detail the central point as EVOLVE that is a web-based system that provides the following;  
An online notification and approval system for visits. See appendix 3 EVOLVE visit flowchart.  
Definitive versions of OAT and national policies that are adopted by OFA.  
Definitive versions of forms and documents essential in the visits process  
Best practice forms and documents to support the visit process.  
Links to national documents and search and reporting facilities.
- To comply with the OFA policy detailed below and guidance for off-site visits and related activities whilst keeping up to date with further advice using EVOLVE. Reference to the 2017 OAT policy and national guidance from OEAP is available within EVOLVE at "[www.oatvisits.org.uk](http://www.oatvisits.org.uk)". It is also available as an electronic file that accompanies this document.
- To ensure staff running a live Off Site Visit have the guidance of an OAT emergency procedures card (2017).
- To ensure, where appropriate, further advice is sought from technically competent persons either employed by or contracted to the employer.

### **Access and Availability**

- All policy, guidance and other documentation e.g. forms, which relate to the off site visits process, are available from the Resources area of the Ormiston EVOLVE website ([www.oatvisits.org.uk](http://www.oatvisits.org.uk)). EVOLVE is the only source of up to date documentation. Staff referencing the documentation from other sources e.g. hard copies and electronic files, should ensure that they are the most up to date versions by reference to the definitive versions on the EVOLVE website. See appendix 2 for a screen shot of a guide for staff users.
- All staff (and Governors) involved in the off site visit process will have access to the EVOLVE website through a personal Username and Password. Staff requiring access must contact the establishment Educational Visits Co-ordinator (EVC) who manages the system.
- It is a requirement for all staff involved in off site visits, whatever their role, to have read and comply with this policy. When in any doubt about those requirements, staff should contact the EVC in the first instance.

### **Off site visits**

A visit is defined as any occasion when a young person on roll at this establishment takes part in any type of activity, organised by or arranged through the establishment, which is carried out beyond the boundary of the establishment site. It does not include Work Experience programmes and young

people attending courses provided by appropriately vetted local Offsite Learning Providers on their premises.

All off site visits must:

- have a clear purpose with identified outcomes for those taking part;
- be planned, approved and carried out in accordance with this policy and EVOLVE;
- have a named and appropriately competent Visit Leader (and where appropriate, deputy) who will have sole, over-all charge of the visit. It is inappropriate for the role of Visit Leader to be shared during a visit.

## **Roles and Responsibilities**

### *Governing Body*

The Governing Body will:

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

### *The Principal*

The Principal delegates approval to the lead EVC but retains responsibility for approval.

The Principal will:

- ensure that all staff and volunteers involved in the visit process are appropriately competent to carry out responsibilities allocated to them and have received training as appropriate;
- ensure that all visits comply with EVOLVE protocols;
- be responsible for approving all visits in accordance with EVOLVE;
- ensure that all visits are approved prior to departure in line with EVOLVE;
- ensure that an appropriately competent EVC has been designated and supported in accordance with this policy and EVOLVE;
- be clear about their role when taking part in the visit as a Leader and should follow the instructions of the designated Visit Leader, who will have sole, over-all charge of the visit;
- ensure that suitable child protection procedures are in place, including vetting at an appropriate level of all voluntary helpers;
- ensure that they have assigned sufficient time for staff to organise visits properly;
- support an apprenticeship /succession planning culture to ensure sustainable visits and the development of competent Visit Leaders and EVCs;
- support the EVC in ensuring that visits are effectively supervised with an appropriate level of staffing;
- support the EVC in ensuring that visit information has been shared with parents and that consent has been sought where necessary;

- ensure that arrangements have been made for the medical needs and special educational needs of all the young people and also address any inclusion issues;
- ensure that they promote a staffing culture that encourages gaining formal accreditations in first aid, so enabling a visit culture that makes access to first aid more readily available;
- ensure that suitable transport arrangements are in place and meet any regulatory requirements;
- ensure that insurance arrangements are appropriate and, wherever possible, are set up to reduce the burden of bureaucracy for all concerned;
- ensure that details related to the visit and participants (including staff) are accessible to a designated 24/7 emergency contact(s) at all times in case of a serious incident;
- ensure that there are contingency plans in place should the visit plan be significantly changed or cancelled (Plan B);
- ensure that EVC functions are delegated as and where required;
- ensure that establishment policy formally adopts a set format for recording written risk assessments or their equivalent as on EVOLVE. ;
- ensure that, where the activity involves a third party provider, appropriate assurances have been sought. Specifically note those national schemes that make seeking provider assurances unnecessary e.g. LOtC Quality Badge, AALS licence, Adventuremark, or a clear management Statement of Competence. This is an integral part of EVOLVE together with specific OAT approval required for adventurous, residential or overseas visits;
- ensure that all visits are evaluated with regard to best value, teaching and learning, quality experiences, and address issues raised by any serious incident that might inform the operation of future activities/visits;
- ensure that the critical incident policy plans for any serious incidents on an off site visit.

#### *The Educational Visits Co-ordinator (EVC)*

The Enrichment Coordinator is lead Educational Visits Coordinator (EVC) and has received appropriate training and is competent to fulfil the role. The lead EVC is assisted by an experienced practitioner in adventurous, residential and overseas visits.

The EVC will, in accordance with OFA policy and EVOLVE:

- be familiar with and have a good understanding of the contents of the OFA off site policy, OAT off site policy and OEAP national guidance and comply with their provisions;
- manage the establishment's EVOLVE account and provide access to and training for staff and Governors on the system;
- identify and record, with the minimum paperwork and using EVOLVE where appropriate, qualifications, training, development, induction and apprenticeship arrangements for all Visit Leaders and Leaders (employed staff and volunteers);
- monitor visit planning, risk management and evaluation of all visits on EVOLVE;
- advise the Principal in relation to Visit Leader/Leader competence and training requirements for all staff involved in the visits process;
- ensure sufficient, appropriately competent and vetted staff and volunteers accompanying the visit in accordance with the risk management arrangements and employer's guidance;
- ensure sensible risk management is in place as detailed on EVOLVE;
- have access to update training opportunities and a technical adviser. The OFA and OAT Off Site visits adviser is:

Ken Hutson

Offsite Education limited

[enquires@offsite-education.co.uk](mailto:enquires@offsite-education.co.uk)

- have regular EVOLVE updates and scrutinise event specific notes which are essential for visits to gain approval and are the risk assessment – please see appendix 1

### *The Visit Leader*

The Visit Leader will, in accordance with OFA policy and EVOLVE:

- be an appropriately competent, employed member of staff at the establishment or engaged through a thorough recruitment process;
- ensure best value principles are used when selecting providers and make appropriate checks in accordance with establishment policy and guidance;
- undertake exploratory visits and/or make enquiries where appropriate;
- ensure that parents are appropriately informed about visits and their written consent and other information are obtained where appropriate;
- ensure that insurance and any financial support procedures are followed;
- ensure emergency procedures, contingency arrangements (Plan B) and systems for recording and sharing information on accidents and near misses are in place before briefing young people and parents;
- ensure that risks are managed using EVOLVE protocols and events specific notes as in appendix 1;
- ensure appropriate supervision of the young people at all times. The Visit Leader must be with the group at all times unless specific arrangements have been made and approved by the Principal;
- ensure that the visit has been approved on EVOLVE before departure.
- Ensure the emergency procedures card (sometimes called the z card) for off site visits is taken on any off site visit. See appendix 4.

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

Leaders will, in accordance with OFA policy and EVOLVE:

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

### *Parents*

- Ormiston Forge Academy will give parents details about off-site visits practice and safety procedures in a visit specific letter or parental meeting and this policy is shared on the academy website;

- Parents will be given sufficient written and other information about all visits to make informed decisions and give written consent, medical and contact details, where appropriate, in accordance with this establishment policy;
- For Adventurous Activities, residential and overseas visits, meetings with parents will be arranged and visit-specific written consent will be required together with up to date information on participants (e.g. current medical issues, emergency contact details);

### **Visit Leader / Leader Competence**

#### **Support**

The competence of those leading a visit is a vital aspect of safe visit management. Staff will be supported in developing competence in the following ways:

- An apprenticeship system, where staff new to visits assist and work alongside experienced Visit Leaders before taking on a leadership role;
- Supervision by Senior staff of some off-site visits;
- Support for staff to attend training courses relevant to the roles of Leader and Visit Leader and full access to EVOLVE for reference and guidance material.

In deciding whether any member of staff is competent to be a Visit Leader/ Leader, the Principal will take into account the following factors:

- Level of relevant experience;
- Any relevant training undertaken;
- The emotional and leadership ability of any prospective Visit Leader to make dynamic risk management judgements and take charge of any emergencies that may arise;
- Knowledge of the children, the venue and the activities to be undertaken.

### **Monitoring of the Visits Process**

- The EVC will monitor all visits through scrutiny of the off site visit forms on EVOLVE;
- Depending on the nature of the visit and the experience of the EVC, the Principal or delegated senior manager will be expected to provide additional scrutiny of visit forms and arrangements for the visit;
- When necessary, the EVC will require further information and action from the Visit Leader and/or those responsible for organising the visit until the EVC is satisfied that the visit meets the requirements of the establishment policy and employer's guidance;
- When necessary the EVC will inform the Principal/Senior Manager of any concerns, in relation to the organisation of the visit, that may have safety implications or may significantly reduce the quality of experience for those taking part;
- For Residential, adventurous or overseas visits EVOLVE requires OAT approval;

### **Risk Management**

- Risk management training will be available to those staff requiring it.
- Establishment generic risk assessments/operational guidelines are available for some areas and activities (e.g. coach travel) to support the Visit Leader with visit planning and the risk management process. The most up to date versions are available from the establishment area of EVOLVE. Generic risk assessments should not be attached to EVOLVE visit forms.
- Some visits and activities will require consideration of additional hazards and their associated risks that are specific to the visit (e.g. comfort breaks/service area stops on longer coach journeys). They will usually take into account the nature and needs of the young

people participating (e.g. special and medical needs), experience and competency of the Leaders, the venue and activities being undertaken. They should be recorded on an *Event Specific Notes Form* which should be attached to the EVOLVE visit form as part of the approval procedure- please see appendix 1.

- It may be that for some visits e.g. low risk, local visits within walking distance of the establishment, there are no significant additional hazards and a generic risk assessment/operational guidelines will be sufficient.
- Visit Leaders should involve other Leaders (including volunteers) in the risk management process. They must be aware of the establishment's generic risk assessments and any additional controls recorded on the *Event Specific Notes* form.
- Where appropriate and where possible, the young people participating in the visit should be involved in the planning and risk management. This will increase their risk awareness and enable them to have a greater ownership of the event.

### **Emergency Procedures and Contacts**

- For all visits, the Visit Leader must be familiar with the guidance and procedures contained within EVOLVE advice is given in the document 2017 OAT guidance for the management of critical incidents and emergencies during offsite visits 2017. This is downloadable at "[www.oatvisits.org.uk](http://www.oatvisits.org.uk)". It is also available as an electronic file that accompanies this document.
- There must be a nominated Emergency Home Contact for all visits, who has access to all the visit details including medical and next-of-kin information for the Leaders as well as the young people. Copies of completed consent forms should not be attached to EVOLVE visit forms they are stored in the main office;
- For visits that take place out of establishment hours or extend beyond the school day, this will be an appropriately competent, named person (e.g. EVC, Office Manager, Senior Manager) who is available at all times (24/7) for the duration of the visit. For some visits (extended residentials) it may be necessary for more than one contact to be nominated in order to ensure 24/7 support;
- Emergency Home Contacts must be familiar with and have access to an establishment *Emergency Card (Home Contacts)* which outlines the action that needs to be taken in an emergency and gives details of others that may need to be contacted as specified on EVOLVE;

### **Insurance**

OFA has full insurance provided through the OAT service Agreement.

### **Inclusion**

OFA has a presumption of entitlement to participate in off site visits.

Accessibility is provided through direct or realistic adaptation or modification.

Integration through participation with peers is sought to ensure opportunity for all.

### **Transport**

#### **Buses & Coaches**

Use of external providers is permitted with the events specific note form detailing any supervision notes and safety aspects.

### **OFA Minibuses**

The use of the OFA minibuses is subject to procedures laid out in the OFA health and safety policy and in national guidance found at;

<https://www.gov.uk/government/publications/driving-school-minibuses-advice-for-schools-and-local-authorities>

Use of staff cars to transport pupils

Any use of private vehicles will be subject to a specific risk assessment on EVOLVE and approval from the EVC.

### **Forms and Checklists**

The definitive versions of the following forms and checklists are available from the Resources area on the EVOLVE website. It is OFA policy that the forms and checklists on EVOLVE must be adhered to and no visit will gain approval if procedures are not followed. Overseas, residential and adventurous visits require specific approval from OAT.

### **References**

1. EVOLVE – type directly into the web browser;  
[www.oatvisits.org.uk](http://www.oatvisits.org.uk)
2. 2017 OAT Policy and national guidance from OEAP is available within EVOLVE at “[www.oatvisits.org.uk](http://www.oatvisits.org.uk)”.
3. 2017 OAT Guidance for the management of critical incidents and emergencies during offsite visits 2017. This is downloadable at “[www.oatvisits.org.uk](http://www.oatvisits.org.uk)”
4. Health and Safety in Schools 2014 - This advice document replaces a number of guidance documents on health, safety and security in schools, including *Health and Safety: Responsibilities and Powers* (2001) and *Health and Safety of Pupils on Educational Visits* (HASPEV 1998).  
<https://www.gov.uk/government/collections/health-and-safety-in-schools>
5. Health and Safety – Advice for schools 2014  
<https://www.gov.uk/government/publications/health-and-safety-advice-for-schools>
6. Outdoor Education Advisers Panel (OEAP)  
<http://www.oeap.info/>
7. Learning outside the classroom quality badge (LOtC badge)  
<http://lotcqualitybadge.org.uk/>
8. Health and safety : advice on Legal duties and Powers DFE February 2014



[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/335111/DFE\\_Health\\_and\\_Safety\\_Advice\\_06\\_02\\_14.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/335111/DFE_Health_and_Safety_Advice_06_02_14.pdf)

Appendix 1 – Example of events specific notes



**EVENT SPECIFIC NOTES**

What are the **really important** things we need to do to keep ourselves safe?

Visit [detail](#) Year 10 Careers in Medicine, University of Birmingham, 22<sup>nd</sup> March 2017 Carried out by Ian MORRISSEY Date 13/02/2017

ISSUE Consider STAGED: Staff, Timings, Activity, Group, Environment, Distance	HOW TO MANAGE IT	WHO TO BE INFORMED		
		PARENTS	STAFF	PARTICIPANTS
Meeting. Visit is during normal school hours, returning to school about 4pm. Group to meet in school car park away from traffic. Parents informed of return time.	By letter and phone if there are any delays.		X	X
Road accident minibus	Staff should make sure seat belts are worn. Students instructed to behave appropriately and the drivers to take due care. Follow college guidelines.		X	X
Road accident while crossing roads	Students made aware of dangers and observed by staff whilst crossing the road. Minibus <u>parked in</u> suitable place for loading and unloading pupils. The minibus will be in the school playground during the loading of pupils before and at the end of the journey.		X	X
Vehicle breakdown	Children are supervised <b>at all times</b> . At least one mobile phone will be kept in the vehicle in case of breakdown.		X	X
Fire within University	Follow all of University fire evacuation processes. Children guided to the fire exits and evacuation points. Staff will be in vicinity of pupils <b>at all times</b> .		X	X
Trips or falls	Children advised to take care when walking around the venue. Pupils advised to wear suitable clothing and footwear.		X	X
Unruly children. An injury may occur if children are not under control or are unruly.	Pupils are instructed to behave appropriately and maturely. All children supervised to make sure they are behaving properly.		X	X

Appendix 2 – screen shot from EVOLVE

## Welcome to Ormiston EVOLVE

### Guide for Staff Users




Your academy now has an EVOLVE account on the Ormiston EVOLVE and receives off-site visits guidance and support from Ormiston Academies Trust through their Off-site Visits Adviser.

Please read this guide carefully as it contains essential information for Staff Users on the new account.

#### To access Ormiston EVOLVE


- Use the web address; [www.oatvisits.org.uk](http://www.oatvisits.org.uk);
- Use the username (not case sensitive) and password (case sensitive) provided by your EVC;
- Use the 'Forgotten username or password' link from the EVOLVE login page if you are unsure of your details. If this is unsuccessful, contact your EVC.
- Usernames should clearly identify you. It is possible to use your school E-mail address for this.
- EVOLVE can be accessed through most smartphone and tablet operating systems and an EVOLVE App is currently being developed.

#### To change your password, & add/amend email address

- After logging-in to EVOLVE for the first time, you must change your password (min. 8 characters containing at least one number and one letter). 
- Click **My Profile** (blue icon).
- From here you can amend your password, add/amend email address, add awards, and view training records.
- Ensure that your E-mail address is added to your profile otherwise you will not be able to use the forgotten password feature or receive E-mail alerts.
- **DONT FORGET TO CLICK THE UPDATE BUTTON BEFORE LEAVING THE PAGE.**

#### To add details of qualifications/awards that you hold

Details of qualifications or awards that you hold, which are relevant to leading off-site visits and activities, can be entered on to EVOLVE, for example: first aid certificate, adventurous activity instructor awards, etc. This feature also allows you to upload scanned copies of certificates, and send you an email reminder in advance of any expiry dates if required.

- Log in to EVOLVE using your username and password.
- Click on **My Profile** (blue icon on homepage) or click **TOOLS** (purple spanner icon) and choose "My Profile" from the menu. 
- Click **My Awards** (bottom of screen)
- Click + to add a new award to EVOLVE.
- Follow the online instructions.
- Always scroll down the awards to see if the award you want to add is already listed before adding a new one.


#### To add a 'test' visit

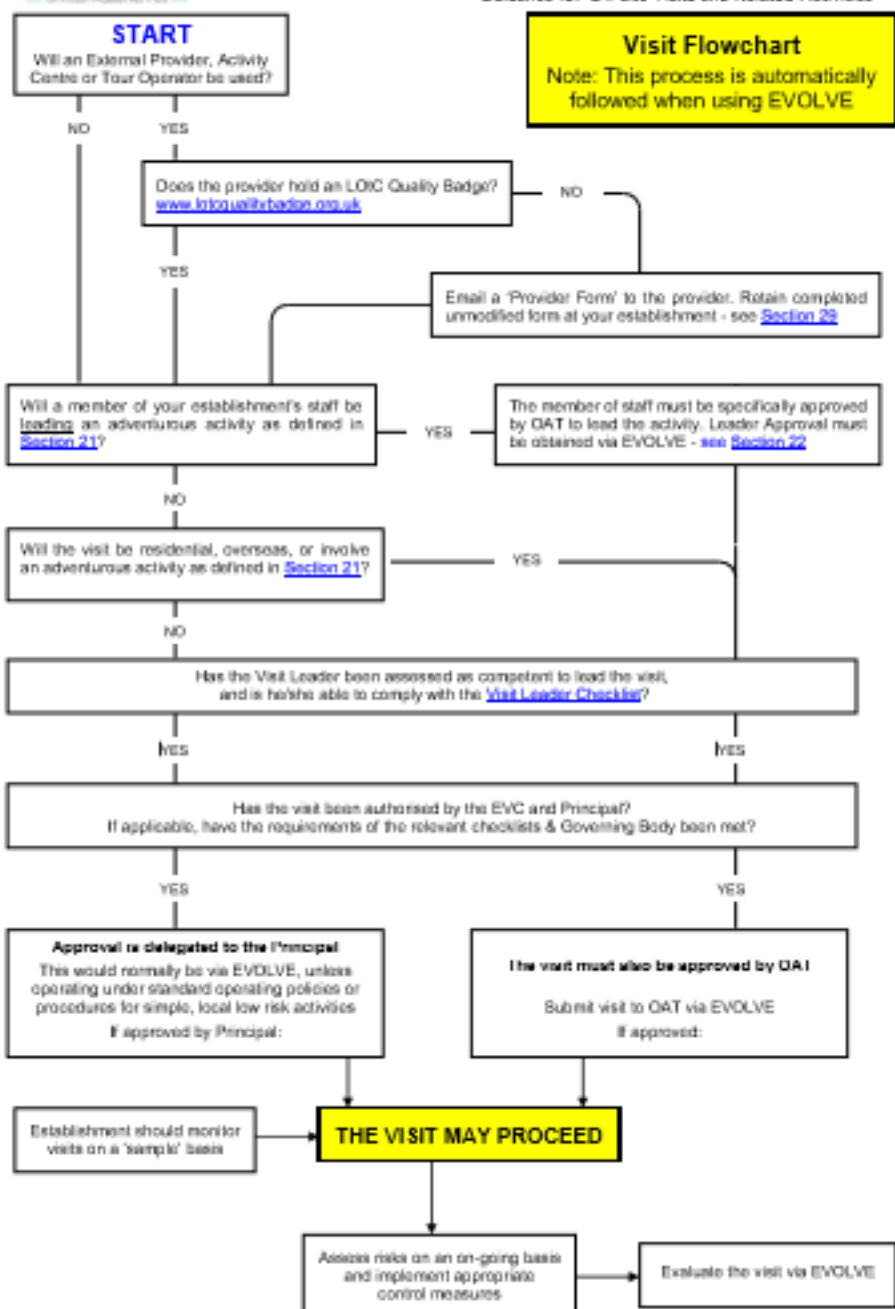
You may add a 'test' visit at any time, for example if you want to practice, or demonstrate EVOLVE to colleagues. To avoid confusion with real visits, the visit name should start with 'Test', eg 'Test Yr 8 Residential'. The visit can be deleted later, either by yourself (if unsubmitted) or your EVC.

- To add a test visit: Click on the blue **[Add]** tab.
- You can edit visit forms and track their progress through the approval procedure from the green **[Track]** tab.

#### To access OAT Policy and Guidance for Off-site Visits

All off-site visits must comply with the OAT's off-site visits policy and guidance and the policies of your academy. All staff involved with visits must be familiar with their requirements. The most up to date versions are only available from the EVOLVE Resources area.

- Click on the pink **[Resources]** tab and then the pink **Guidance** button. This area contains important documents and web links to other, national best-practice resources. 



Appendix 4 - The Emergency Procedures card (sometimes called the Z card). A copy must be taken on all off site visits.

## EMERGENCY PROCEDURES

In the event of an incident (on-site or off-site) overwhelming your team's coping mechanisms, use the following to guide your actions.

### VISIT LEADER ACTIONS

#### FIRST ACTIONS

- Remain calm – assess the situation
- Safeguard yourself and then any other uninjured members of the group
- Make sure all other members of the party are:
  - accounted for
  - safe
  - adequately supervised
  - briefed to ensure that they know what to do to remain safe
- Delegate other leaders if possible so you can keep an overview of events and to allow 'concurrent' activity

#### ANY CASUALTIES?

Are Emergency Services required?  
Call 999 (UK) or 112 (from any mobile in EU/UK)

#### ADMINISTER FIRST AID:

- Casualties need to be able to breathe – if they are unconscious this means being put into a safe airway position
- You need to try to find and stop any serious external bleeding
- You need to protect the casualty from the environment – keep them warm
- Monitor their condition, talk to them, reassure them, hold their hand and provide emotional support

### CONTAINING THE EMERGENCY

#### ACTIONS

Once the immediate emergency has been contained:

- Contact either your Academy Emergency Home Contact or the Ormiston Academies Trust ("OAT") Critical Incident Controller – see reverse of this sheet for details
- Liaise with and take advice from emergency services if they have attended the scene
- Control communications – prevent group members from using phones or going online until approval is given; do not contact parents/carers, this will be done by the Critical Incident Controller/Emergency Home Contact
- Consider the physical needs of the group casualties in terms of shelter, refreshments, transport/repatriation
- Consider the emotional needs of the group such as removing them from the scene, providing emotional support (they can often do this for each other), giving them useful things to do
- Never admit liability of any sort
- Refer all press/media related enquiries to OAT's media team (PLMR) on:
  - [communications@ormistonacademies.co.uk](mailto:communications@ormistonacademies.co.uk) or on 0800 368 8387
- Do not allow access to information or the group to anyone except authorised officials
- Keep a written log of all actions taken, conversations held and a timescale
- Inform the Foreign Office Consular Assistance Team if abroad

Working more together  
 OAT  
 Ormiston Academies Trust  
 Emergency procedure for off-site visits  
 Contact your leader



# CONTACTING YOUR ACADEMY OR OAT

## COMPLETE THIS SECTION:

**EVOLVE VISIT ID NUMBER:**

\_\_\_\_\_

### CONTACT INFORMATION:

Academy Emergency Home Contact/  
 Critical Incident Controller (name  
 and number):

\_\_\_\_\_

\_\_\_\_\_

**Casualty/casualties to hospital!**  
 Accompanying Leader name and  
 contact number:

\_\_\_\_\_

\_\_\_\_\_

Name(s) of casualty and destination:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### OTHER CONTACTS:

\_\_\_\_\_

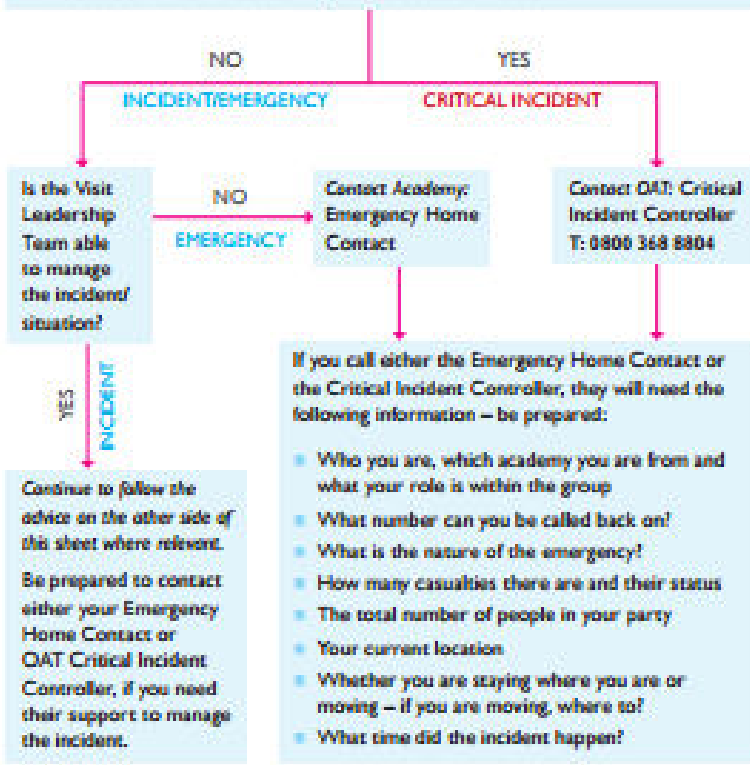
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\_\_\_\_\_

Do any of the following apply to the emergency:

1. Fatality of one or more members of the party
2. An incident where a group member(s):
  - has suffered a serious (life threatening) injury or illness
  - is at serious risk of harm e.g. child protection, missing child
3. An incident that leads to serious disruption of the visit
4. A situation where the media may or have become involved!



**BIRMINGHAM OFFICE:**  
 Ormiston House, 144 Newhall Street, Birmingham, B3 1RY  
 T: 0121 236 5100

**SOUTHERN OFFICE:**  
 Unit 10, Chilgrove Business Centre, Chilgrove, Chichester, PO18 9HU  
 T: 01243 885 630

Ormiston Academies Trust

Achieving more together