

Chapter 1 - Types of visit and planning/approval procedures

SUMMARY OF KEY POINTS – see rest of chapter below for full details					
1. Categories of visits:					
	Description	Notify managers using:	Submit before visit:	Checked/ Approved by:	Final Authorisation by:
Cat 1	Day visits (Frequently repeated/recurring)	Day visits form or EVOLVE	2 weeks	Educational Visits Coordinator (EVC)	Headteacher/ Manager (<i>all establishments</i>)
Cat 2	Day visits (one off/ occasional)	Day visits form or EVOLVE	2 weeks	Educational Visits Coordinator (EVC)	Headteacher/ Manager (<i>all establishments</i>)
Cat 3	UK residential	EVOLVE only	6 weeks	EVC + Head (<i>for LA schools/ establishments</i>) EVC + LA (<i>for academies/ independent establishments</i>)	LA (<i>for LA schools/ establishments</i>) Headteacher/Manager (<i>for academies/ independent establishments</i>)
Cat 4	Overseas	EVOLVE only	6 weeks	EVC + Head (<i>for LA schools/ establishments</i>) EVC + LA (<i>for academies/ independent establishments</i>)	LA (<i>for LA schools/ establishments</i>) Headteacher/Manager (<i>for academies/ independent establishments</i>)
Sub Cat "A"	High risk activities and environments	EVOLVE only	6 weeks	EVC + Head (<i>for LA schools/ establishments</i>) EVC + LA (<i>for academies/ independent establishments</i>)	LA (<i>for LA schools/ establishments</i>) Headteacher/Manager (<i>for academies/ independent establishments</i>)
<p>2. Characteristics of Cat "A" high risk activities and environments Risk of serious harm (e.g. most adventurous activities); unfamiliar/unpredictable environments (e.g. most water-based activities); require specific leader qualifications (e.g. hillwalking); require specialist equipment or clothing (e.g. rock climbing); involve remote/challenging locations (e.g. orienteering); involve remote or indirect supervision (e.g. Duke of Edinburgh expeditions); involve young people with challenging behaviour/additional needs.</p>					
<p>3. Access EVOLVE via https://evolve.edufocus.co.uk</p>					
<p>4. EVOLVE passwords (new/reset): Contact your own EVC or the LA Ed Visits Officer (taff.bowles@eastriding.gov.uk) to request new username/password. Passwords can be reset by users via https://evolve.edufocus.co.uk</p>					
<p>5. Approval Responses</p> <ul style="list-style-type: none"> • "Not Approved" = significant changes needed • "Outline Approval" = basically OK but needs minor changes or more information • "Approved" = checked and considered satisfactory by manager • "Authorised" = approved by lead manager 					

1.1 Categories of visit and approval requirements (see also chapter 17: Seeking Visit Approval)

Visits may be identified as one of the following:

NON-RESIDENTIAL VISITS (that do not involve high risk activities or environments)

- **Category 1 – FREQUENTLY RECURRING or REPEATED DAY VISITS/OFFSITE ACTIVITIES**

Offsite visits and activities that are all basically similar in nature (i.e. similar venues /activities/group members/leaders) and repeated frequently over a stated time period (e.g. to cover the season's away-fixtures by a school sports team, or a series of ten weekly visits by young people to the local swimming pool).

Category 1 visits should be recorded using:

- EVOLVE online or on paper using an alternative “recurring day visits” form (a recommended form can be accessed via the documents page on EVOLVE);
- one generic/blanket form, which should be adequate to cover all similar visits within the stated time period, providing the Visit Organiser makes the Senior/Line Manager fully aware of the normal operating procedures, and provides assurances regarding the minimum standards that will be applied for all visits (e.g. the group will always be accompanied by a minimum of 2 members of staff) and notes any foreseeable variations (e.g. occasionally, 1 of the leaders may be an adult volunteer). The Visit Organiser should notify the Senior/Line Manager, and obtain further approval if there are any significant changes to agreed arrangements

Category 1 visits should normally be submitted for approval:

- at least 2 weeks in advance of the first visit

Category 1 visits should normally be checked and approved by:

- the Visits Coordinator if applicable (in schools, this is the Educational Visits Coordinator)

Category 1 visits should normally be checked and authorised by:

- the designated Senior Manager (in schools, this is normally the Headteacher – and for other establishments this is normally the relevant Senior Manager)

- **Category (Cat) 2 – STANDARD DAY VISITS/OFFSITE ACTIVITIES**

One-off or occasional offsite visits that take place during the day, without an overnight stay (e.g. a day visit to a local museum).

Category 2 visits should be recorded using:

- EVOLVE online or on paper using an alternative day visits form (a recommended form can be accessed via the Documents section on EVOLVE)
- one form per visit

Category 2 visits should normally be submitted for approval:

- at least 2 weeks in advance of the first visit

Category 2 visits should normally be checked and approved by:

- the Visits Coordinator if applicable (in schools, this is the Educational Visits Coordinator) or designated deputy

Category 2 visits should normally be checked and authorised by:

- the designated Senior Manager (in schools, this is normally the Headteacher – and for other establishments this is normally the relevant Senior Manager)

RESIDENTIAL VISITS

- **Category 3 – UK RESIDENTIAL VISITS**

Visits in the UK that involve one or more nights away from home (e.g. an overnight trip to London).

Category 3 visits should be recorded using:

- EVOLVE online
- one form per visit

Category 3 visits should normally be submitted for approval:

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- at least 6 weeks in advance of the visit.

Category 3 visits should normally be checked and approved by:

- the Visits Coordinator if applicable (in schools, this is the Educational Visits Coordinator) or designated deputy
- *(For all LA schools/establishments)* the designated Senior/Line Manager (in schools, this is normally the Headteacher – and for other establishments/organisations this is normally the relevant Senior Manager) or designated deputy
- *(For all academies/independent establishments)* the Local Authority Educational Visits Officer, or designated deputy

Category 3 visits should normally be authorised by:

- *(For all academies/independent establishments)* the Headteacher, or designated deputy
- *(For Services responsible for looked after children)* the Childcare Service Manager or designated deputy
- *(For all LA schools/other establishments)* the Local Authority's Educational Visits Officer - or designated deputy

• **Category 4 – OVERSEAS VISITS**

Residential or day visits to a place outside England/Scotland/Wales e.g. a rugby tour to Dublin.

Category 4 visits should be recorded using:

- EVOLVE online
- one form per visit

Category 4 visits should normally be submitted for approval:

- at least 6 weeks in advance of the visit
- N.B. for expeditions and other overseas visits that involve significant planning time and financial commitment, it is recommended that "Outline Approval" is initially obtained from all managers before firm bookings are made - preferably at least 6 months in advance

Category 4 visits should normally be checked and approved by:

- the Visits Coordinator if applicable (in schools, this is the Educational Visits Coordinator) or designated deputy
- *(For all LA schools/establishments)* the designated Senior/Line Manager (in schools, this is normally the Headteacher – and for other establishments/organisations this is normally the relevant Senior Manager) or designated deputy
- *(For all academies/independent establishments)* the Local Authority Educational Visits Officer, or designated deputy

Category 4 visits should normally be authorised by:

- *(For all academies/independent establishments)* the Headteacher, or designated deputy
- *(For Services responsible for looked after children)* the Childcare Service Manager or designated deputy
- *(For all LA schools/other establishments)* the Local Authority's Educational Visits Officer - or designated deputy

If any of the above 4 types of visit involve what may be regarded as "High risk activities or environments" they MUST be given an additional subcategory "A" classification:

ALL TYPES OF VISIT THAT INVOLVE HIGH RISK ACTIVITIES OR ENVIRONMENTS

• **Sub Category "A" – HIGH RISK ACTIVITIES and ENVIRONMENTS**

All day visits, or residential or overseas visits that involve activities or environments which present significant hazards and higher levels of risk that are significantly more complex or more serious (in terms of severity and/or likelihood) than might normally be encountered in everyday life, and are generally perceived as being more complex and hazardous. For example: a weekly climbing day visit = 1A, an occasional day visit to dry ski slope = 2A, a residential stay at outdoor centre in the UK = 3A, an overseas canoe expedition = 4A.

Category Sub Category "A" (High Risk) visits should be recorded using:

- EVOLVE online
- one form per visit

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Category Sub Category “A” (High Risk) visits should normally be submitted for approval:

- at least 6 weeks in advance of the visit.

Category Sub Category “A” (High Risk) visits must be checked and approved by:

- the Visits Coordinator if applicable (in schools, this is the Educational Visits Coordinator) or designated deputy
- (*For all LA schools/establishments*) the designated Senior/Line Manager (in schools, this is normally the Headteacher – and for other establishments/organisations this is normally the relevant Senior Manager) or designated deputy
- (*For all academies/independent establishments*) the Local Authority Educational Visits Officer, or designated deputy

Category Sub Category “A” (High Risk) visits are finally authorised by:

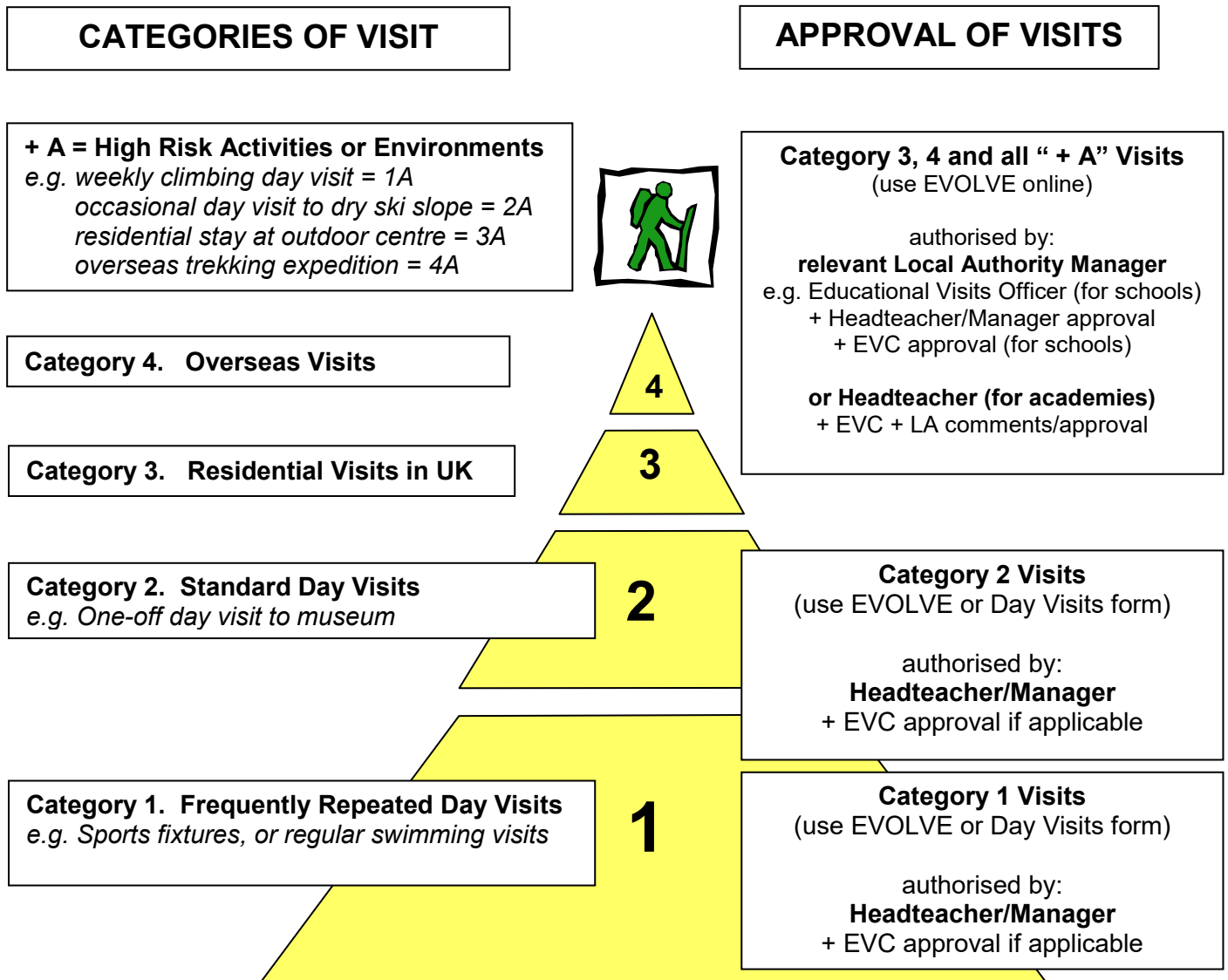
- (*For all academies/independent establishments*) the Headteacher, or designated deputy
- (*For Services responsible for looked after children*) the Childcare Service Manager or designated deputy
- (*For all LA schools/other establishments*) the Local Authority’s Educational Visits Officer - or designated deputy

1.2 Why is it important to highlight those visits with high risk activities and environments?

- The main purpose of identifying those visits that involve “high risk activities or environments” is to enable someone else, who has relevant knowledge and experience, to:
 - check the plans and give informed feedback;
 - make an additional objective assessment as to whether the activity is safe and suitable.
- The adding of classification “A” should therefore be seen positively as a means of gaining additional support and guidance, rather than negatively, as an extra “hoop” to jump through.

The categories and approval requirements are clearly illustrated in the following diagram:

Categories of visit and approval requirements



1.3 What visits should be recorded as Category “A” (i.e. involving “high risk activities or environments”)? (see also VG 8 for further details)

- All activities and environments have potential hazards and involve some degree of risk.
- An element of personal judgement is needed to decide if an activity or environment should be classified as “high risk”.

Examples of low risk activities and environments

- Many activities and environments present few significant hazards, and pose minimal risks. Such activities might include:
 - walking under supervision in parks or on non-remote country paths;
 - field studies in environments that present no significant hazards such as cliffs or deep water.
 - visits to most cinemas, theatres, museums, theme parks etc.

Characteristics of high risk activities and environments

- High risk activities or environments are those that are likely either to:
 - threaten serious harm, if particular care and special precautions are not taken;

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- be new and unfamiliar to at least some of the participants (perhaps even some of the leaders);
- offer a larger than normal degree of unpredictability (e.g. weather conditions might substantially, and perhaps suddenly, change an activity from being low risk to high risk);
- require additional and specific leader competence (e.g. qualifications, training or experience);
- require additional specialist equipment or clothing (e.g. climbing harness or wetsuit);
- involve locations that are remote or difficult to access, and where it might take emergency services considerable time to provide additional assistance or medical care;
- involve remote or indirect supervision;
- involve children/young people whose behaviour is challenging and difficult;
- involve children/young people with additional needs.

Examples of high risk activities

- Some activities and environments are generally regarded as “**high risk**”, for example:
 - **all outdoor adventure activities** such as caving, climbing, canoeing, mountain biking, mountain walking, sailing, windsurfing, horse riding, rock or gorge scrambling ;
 - **other activities**, such as dry slope skiing, road cycling, rope courses, rollerblading, water skiing etc. that may involve an extra degree of vulnerability by, for example, travelling at high speeds or at a height above the ground;
 - **remote, challenging or unpredictable environments**, such as rocky mountains, steep or slippery slopes, cliffs, scree/boulder fields, snow/ice, fast moving rivers, sinking sand, or deep water;
 - **activities that are less predictable and controllable**, and use equipment which potentially could cause serious harm such as rifle shooting, paintballing, go-karting, quad biking, archery (N.B. some of these activities may not be permissible due to the lack of insurance cover)
 - **most water-based activities** - it should be noted that a high proportion of recent fatalities on visits have involved activities based on or near water. Not all activities associated with water are necessarily “high risk”, but leaders should be aware that water is a particularly unpredictable environment, and extra caution should be exercised when groups are near coasts, and when close to water which is deep, fast moving, tidal, or has waves or currents - such environments should be regarded as “high risk”. ROSPA provides good practice advice for waterside environments (e.g. “Group Safety at Water Margins”), available via <https://www.rospa.com/leisure-safety/water/advice/>. There is also detailed guidance available within the LA’s generic risk assessments;
 - **adverse climate/weather conditions** - it should be noted that the degree of risk may also be increased by other factors, such as the climate or weather conditions. These, in turn, are often a reflection of the time of year that the activity is planned (e.g. a lowland walk might be considered low risk in the summer, but potentially more hazardous in winter conditions).
 - **remote staff supervision** (e.g. Duke of Edinburgh Award Expeditions) - adventurous activities or hazardous environments where there is no immediate or direct staff supervision.

1.4 Other factors to consider when deciding if a visit should be recorded as Category “A” (i.e. involving high risk activities or environments)

- It is impractical and unhelpful to compile a precise and comprehensive list of all high risk activities and environments because there are too many variables. For example, playing a game beside a shallow lake might be perceived as a “high risk activity” for a group of 5-year-olds, but perhaps as only a minimal risk for a group of 17-year-olds. Similarly, a closely supervised visit to a country park might normally be viewed as “low risk”, but if the visit involves orienteering, which is remotely supervised, and the park includes sections of deep water or exposed cliffs, then the visit might best be described as “high risk”, and given the sub-category “A”.
- Moreover, different people, according to their individual circumstances and experience, and according to society’s prevailing attitudes, may perceive hazards and associated risks quite

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differently. For example, travelling in a coach may actually present a much higher risk than canoeing on a lake, but it is not normally regarded as a “high risk activity”, because it is familiar and “normal” to most people. However, just because an activity is undertaken regularly does not necessarily mean that it should be regarded as “low risk”.

- General principles for deciding if a visit should be recorded as a Category “A” visit (i.e. involving high risk activities/environments) should be:
 - if there is any uncertainty, ask other people to obtain an objective consensus of opinion;
 - if Group Leaders, EVC’s, Managers, or Headteachers are unsure, seek guidance from the Local Authority’s Educational Visits Officer;
 - if in any doubt, err on the side of caution, and categorise the visit as Category “A” (high risk). In this way, the visit plans will also be checked by the LA Educational Visits Officer who will give additional support and guidance if required. The addition of LA Approval should give visit leaders further reassurance that the visit plans are considered to be suitable and sufficient.

1.5 Why are there several different levels of approval?

- All visit leaders – whatever their level of experience - occasionally make mistakes...and of course, some mistakes have serious consequences.
- If plans and decisions are made only by a single leader, without appropriate checks made by others, the likelihood of making a mistake with serious consequences is much greater.
- Indeed, several of the recent fatalities on visits have involved leaders operating independently, with apparent disregard to the advice and guidance of others.
- A checking system can therefore be a sensible and reasonable means of maintaining and improving safety standards, and of reducing the likelihood of mistakes.
- If the checks are made by people with appropriate knowledge and experience of the activity and/or environment, it reduces further the risk of making a serious mistake being made.
- Competence generally exists in-house for the Senior Manager/Headteacher (with EVC support if applicable) to make sensible judgements and give Final Authorisation for Category 1 and 2 (Day) visits, providing no significantly hazardous activities or environments are involved.
- In schools, the Governing Body and Headteacher should clearly state within their own policy on Educational Visits who is responsible for approving and checking visits. This may vary depending upon the circumstances of each school, but those involved should have sufficient knowledge and experience of educational visits to be able to give sensible feedback, guidance and support, as well as to assess and approve visits.
- For schools, the Governing Body can provide a valuable additional level of support and guidance, but individual schools should decide if this is appropriate, and the agreed approval procedures should be made clear within the school’s own Visits Policy.
- Where the Overall Group Leader/Visit Organiser is the Senior Manager/Headteacher, it is good practice for the visit details to be checked and approved by an additional level of authority. Category 3,4, and “A” visits will always still require additional LA approval, but it is good practice, in such instances, for day visit proposals to be checked and approved by another suitable manager (for schools, this might be a representative of the Governing Body).
- Category 3 (UK residential), 4 (overseas) and all Subcategory “A” (hazardous activities and environments) visits are usually more complex, and require more careful planning. The Local Authority should therefore also check and approve these types of visit, and visits should not go ahead without final LA Authorisation.

1.6 What is EVOLVE Online?

- The East Riding of Yorkshire Council operates EVOLVE which is an online system for the notification and approval of visits, which must be used by all schools and other relevant ERYC services (involving children and young people) for Category 3, 4 and “A” Visits, and is optional for Category 1 and 2 (Day) Visits.
- The EVOLVE system enables the Visit Organiser to record, and then to submit by email to each of the approving authorities, full details of the visit plans for checking and approval.
- The EVOLVE database enables all those who are responsible for visits to have immediate online access to all current and past visit records. This is particularly important if an

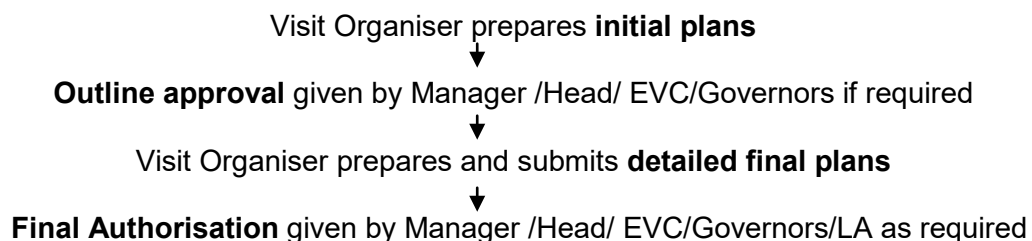
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emergency occurs during a visit. As a consequence, all those responsible should be familiar with using the EVOLVE system.

- The EVOLVE website can be accessed by all those who have been given their own username and password by the school or LA. New requests for a username and password should be submitted by email to the school's Educational Visits Coordinator or the LA Educational Visits Officer. An individual's own personal username and password should be kept confidential and used only by that individual.
- The EVOLVE form provides a comprehensive checklist and aide memoire to assist the Visit Organiser when planning a visit, and the information and assurances given provide managers with an effective means of checking and approving the visit. It is important therefore that the EVOLVE form is completed by the Visit Organiser, as they are responsible for planning and leading the visit, and accountable for the information given.

1.7 What is the process for the Notification and Approval of Visits?



1.8 Outline Approval

- The Overall Group Leader/Visit Organiser should normally submit basic plans for the visit and receive initial go-ahead approval from the relevant authority (e.g. Manager, EVC, or Headteacher) before making detailed arrangements. This process enables the approving authority to check that the basic outline plans and proposals, such as the visit dates, costs, group members, staffing and cover, are acceptable.
- Initial plans must be provided with enough detail for those giving initial approval to make informed judgements as to the overall suitability and safety of the intended venture.
- Initial approval only gives the go-ahead for further detailed arrangements to be made, and it does not give full approval/permission for the visit.
- In some cases, especially in small schools/establishments, it might be sufficient to obtain initial approval verbally from the Headteacher/Manager.
- However, it may be preferable to establish a more structured procedure using either:
 - a simple written form with outlined details of the visit, to which the appropriate authority can add their signature of initial approval, or
 - the EVOLVE online system which will allow Visits Organisers to submit basic details of the visit online and request “Outline Approval” from the relevant managers. By giving “Outline Approval” the managers provide the Visit Organiser with permission to go ahead with the detailed planning arrangements, and the form can then be returned to the Visit Organiser to record the additional information required before resubmitting the form for final authorisation.
- Whichever procedure is most appropriate, the individual school/establishment's own Visits Policy should clarify what is required internally for Outline Approval and final authorisation.
- For most types of visit it is only necessary to obtain Outline Approval from the relevant internal authorities (i.e. EVC/Manager/Head/Governors) without notifying the LA. However, if a visit will later require LA Approval, and it involves considerable financial outlay and/or binding commercial contracts (for example, Overseas Expeditions), the Visit Organiser should normally first obtain Outline Approval (via EVOLVE Online) from the Manager/Headteacher/Governors AND the relevant Local Authority managers prior to the signing of the contract or paying any deposit.

1.9 Final authorisation of visits (see also Chapter VG 18 for further details)

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- No educational visit or offsite activity should normally go ahead unless clear final authorisation has been given by all of the relevant personnel.
- The school/establishment's own Visits Policy must detail who is responsible internally for checking and approving visits. It might be necessary to obtain the approval of several different managers, but there must be a clear and unequivocal statement in the Policy identifying who has the authority to give final authorisation for each specific category of visit.
- When visits are submitted for approval, each of the authorised personnel must check the details of the visit plans carefully to assess the safety and suitability of the visit.
- Particular attention should be given to the competence of the leaders (it might be helpful to check the record of each leader's qualifications, experience and training – this should be found in the school/establishment's own Educational Visits file, or accessed online via the EVOLVE database (in the staff profile section).
- If there are significant concerns about the visit, whether for safety or other reasons, the visit should not be given final approval.
- It is important that any relevant feedback, or additional guidance and support is given to the Visit Organiser if required, and that questions regarding areas of concern are answered satisfactorily.
- Each of the relevant managers can respond to a request for visit approval by giving the visit one of following levels of status:

“Not Approved” the visit is not permitted to proceed – this might be for safety or other reasons, but a full explanation must be given by the manager. It might still be possible to arrange a similar visit, but significant changes may need to be made, and it is likely that a new visit form will need to be completed and submitted.

“Outline Approval” the visit is approved in principle, but further information or action is required before final authorisation can be given – the manager should explain any concerns and add comments that make it clear to the Visit Organiser what needs to be done – for example, whether the information provided was incomplete, or there are aspects of the visit which may need further attention, or there are concerns which first need to be answered satisfactorily. Once these issues have been addressed and dealt with satisfactorily, the visit can be resubmitted for final authorisation.

Final authorisation for a visit is signified by the following status terms, depending upon the category of visit:

“In House Approval” (required for Cat 1 and 2 low-risk Day Visits – N.B. for Academies, “In House Approval” is the final authorisation required for ALL categories of visit).

The visit is given full approval internally by the school/establishment's Manager/Headteacher to proceed – the managers may, however, still wish to provide written feedback which might include some extra requirements, or specific guidance for the Visit Organiser to consider.

“LA Approval” (required for Cat 3 UK Residential, Cat 4 Overseas, and all Cat “A” High Risk visits for all LA Maintained Schools/Establishments).

The visit is given full approval to proceed – the LA Manager may, however, still provide some provisos, recommendations, or guidance to consider.

1.10 Seeking approval for Category 1 and 2 (Day) visits

- Once the Visit Organiser has completed the main plans and preparations, full details of the visit must be submitted to the relevant authorities for approval.

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- At least two week's notice is recommended, but individual schools/establishments should clarify their requirements in their own Educational/Offsite Visits policy.
- EVOLVE Online is an ideal means for the notification and approval of all visits, including most Category 1 and all 2 (Day) Visits. The system can store all visit details centrally, and will allow staff to easily access information from anywhere. However, the requirements of different establishments vary enormously, and therefore it is not mandatory to use the EVOLVE online system for category 1 and 2 (Day) visits. Some establishments may find it simpler and may wish to continue using an existing paper-based system. A template form for "frequently repeated day visits" is available in the Resources section on EVOLVE and is recommended for visits that recur frequently, but not regularly on the same day each week.
- If an establishment prefers to use a system other than EVOLVE for recording and approving category 1 and 2 (Day) visits, the Manager/Headteacher must make this clear in the school/establishment's own Educational/Offsite Visits policy, and it is their responsibility to ensure that there is a clearly established and rigorous system for recording, checking, and approving such visits internally.
- If the Visit Organiser wishes to notify and obtain approval for a visit from a number of other managers, perhaps from other establishments (for example, if young people from a number of different establishments are involved in a joint visit) there is a facility within EVOLVE to notify them all, so that they can each give their comments and approval response.

Seeking approval for Category 3 (UK Residential), 4 (Overseas), and "A" (High Risk activities/environments) Visits (see also Chapter VG 18 for further details)

- Once the Visit Organiser has completed the main plans and preparations, full details of the visit must be submitted to all the relevant authorities (Manager/Headteacher, EVC, and LA) for approval, via EVOLVE online.
- Visit details should normally be submitted at least 6 weeks in advance of departure (in order to allow sufficient time for processing, and for changes to be made if required).

1.11 Amendments to Approved Visits

- Any significant changes (e.g. in staffing levels) that occur to visit plans after the visit has received final authorisation (or after details have been submitted for processing) should be notified in writing to all relevant levels of management.
- Any proposed changes should be acknowledged and approved accordingly by all relevant levels of authority. The approval status of the visit may need to be reconsidered – in exceptional circumstances, the visit may need to be cancelled or postponed, or further changes may need to be made before final authorisation can be given.
- For Category 1 and 2 (Day) Visits, it is normally just the internal Senior Manager/Headteacher and EVC (if applicable) who must be notified of, and give approval to changes.
- For Categories 3 (UK residential), 4 (overseas) and all "A" (high risk activities/environments) Visits, the visit plans must be submitted via EVOLVE online. The EVOLVE system has the allows for the notification and approval of additional changes if a request is made to the EVC and/or Headteacher, but it may be necessary to resubmit the plans once the changes have been made.

1.13 Planning visits

- The Planning Checklist in Appendix VGA 1.1 can be used by Visit Organisers to ensure that visit plans and preparations have been satisfactorily completed.

1.14 Work related learning during visits

- Visits involving workplaces must be treated very carefully, and a distinction should be made between "work experience" (where young people consider career options by actively participating some aspects of the work activity) to "work-related learning" (where young people might attend workplaces, but as observers only). The distinction may be less clear if young people on a visit to a workplace environment are given the option to sample or "have a quick go" at a work-related activity. In such circumstances, visit leaders should be aware that:
 - workplaces often present unusual hazards that casual visitors (such as school staff or pupils) may not be fully aware of, or familiar with;

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- trained and experienced employees from the work place might perceive the use of specialist equipment to be easy, or a particular task to be routine and safe, but there may be additional risks for novices (such as visiting school pupils) that the employees are not aware of, or trained in handling;
- the employees may be highly trained in their specific job, but they may not be competent “instructors”, or experienced in working with young people;
- a work environment is usually developed to cater safely for a small group of trained personnel, but it may be unsuitable and ill-equipped to cater for the visit of larger groups of untrained young people;
- misunderstandings regarding the roles of staff or the levels of safety provision can easily occur, and can lead to accidents;
- workplaces may not be appropriately insured to provide work-related activities to visiting school pupils, and the employer’s liability may be compromised as a result.
- Therefore staff who are planning offsite visits involving young people participating (however briefly) in work related activities (e.g. making a pizza at a pizza factory) should:
 - undertake, along with the provider, appropriate risk assessments of the activity, and ensure that adequate precautionary measures are taken to render the risks minimal and acceptable;
 - ensure that the other leaders and group members are made aware of the risk assessment and management measures;
 - ensure that parents/guardians are informed and give their prior consent;
 - ensure that appropriate insurance cover is available;
 - liaise closely with the provider, and consult other expert advice, if deemed necessary;
 - be wary of allowing young people to participate in impromptu, unplanned work-related activities, without a very careful dynamic risk assessment of the situation. In such circumstances, it is ultimately up to the Group Leader’s judgement to decide if the risks are minimal and justified, bearing in mind also the potential educational benefits of the activity.

1.15 Work experience

- Separate guidance is available for “work experience”, as this does not constitute a standard “educational” or “offsite” visit. The health and safety checks and risk assessment procedures for specified workplace visits and work experience are different from those on a standard visit. Staff should familiarise themselves with the latest publications and guidance relating to “Work Related Learning and The Law” and “Work Experience” which should be available in all schools.

1.16 Collaborative Learning (FE College placements, 14-19 diploma courses etc.)

- Collaborative Provision involves young people undertaking part of their education away from their Home Establishment, at establishments run by other providers, for example colleges, employers, training providers, etc.
- At times these providers will want to involve young people in outdoor learning, off-site visits or learning outside the classroom.
- Before any provider is used to deliver collaborative provision, the Home Establishment should ensure that the provider is appropriately vetted and that a contract or Service Level Agreement is in place, which clearly lays down the minimum required operating standards. This contract or Service Level Agreement should include the arrangements for any outdoor learning, off-site visits or learning outside the classroom. It should require providers to either comply with the policy and procedures for outdoor learning used by the home establishment, or to demonstrate that their policies and procedures covering this area are equally robust.

Responsibilities of the Home Establishment

The Home Establishment should ensure that:

- they have a robust policy that sets out the operational requirements for collaborative working. This should include clear arrangements for the hand-over of responsibility for supervision.
- they have appointed a named Collaborative Curriculum Co-ordinator to take over-sight and responsibility for the collaborative arrangements.

Visits Guidance (VG)

1. Types of Visit and Planning/Approval Procedures

- the establishment's policy for collaborative provision is shared with the provider, and that the provider understands the requirements of this policy.
- if the provider does not comply with the same policy and procedures for outdoor learning and off site visits the home establishment should have a copy of the providers procedures and understand how these operate.
- there is a contract or service level agreement with the provider.
- there is effective two-way communication to ensure both the provider and school are kept updated on specific health and safety, medical, SEN and pastoral issues.
- those in a position of parental authority are fully informed of the nature of provision (including any transport arrangements) and that appropriate consents are obtained.
- quality assurance processes and procedures are agreed with the provider, including reporting procedures, and that these are subject to on-going review.
- transport arrangements are properly risk assessed and subject to on-going review, informing parents as appropriate.

Responsibilities of the Provider

The provider has a duty of care and must comply with legal requirements for health and safety and insurance. The provider should ensure that:

- there is a policy document for collaborative delivery based on local protocols.
- there is a policy for safeguarding and child protection - made available to the Home Establishment.
- the Home Establishment and learners are supplied with accurate course information, including accreditation outcomes and the further learning, training or employment opportunities to which the course or activity provides direct access.
- there is a contract or service level agreement with a named home establishment or consortium of establishments, based on local protocols.
- they have appointed a Collaborative Curriculum Co-ordinator for the designated provision.
- they have a copy of the Home Establishment policy for collaborative provision, ensuring that they understand how this impacts on their own operational requirements.
- any staff training needs are addressed.
- risk-benefit assessments are in place.
- quality assurance processes and regular reporting procedures have been agreed with the Home Establishment.
- For further information, see the following webpages from the Outdoor Education Adviser Panel national guidance:

Collaborative Provision for 14 – 19 Curriculum delivery

<http://oeapng.info/wp-content/uploads/downloads/2012/04/71-Guidance-Principles-governing-Collaborative-Provision-for-14-19-Curriculum-Delivery-for-Establishments-1.pdf>

VISIT LEADER CHECKLIST

Check

Initial planning

- Aims/objectives
- Suitable destination/ location/ dates /times
- Safety/suitability, availability of accommodation/venue(s)
- Basic programme
- Group members (basic plans)
- Staffing (basic plans)
- Initial/Outline Approval** (this can be given using paper system or EVOLVE, as required)

Detailed planning

- Group members (details)
- Staffing (details)
- Staff ratios
- Additional inspection/ planning visit of venue (if appropriate)
- External service providers – quality/safety checks
- Initial parental letter - information/consent/deposit?
- Bookings
- Insurance
- Finance
- Transport
- Minibus (if appropriate)
- Detailed programme
- Generic Risk Assessments
- Additional parent letter(s) - information/ consent/ final payments
- Specific Visit Risk Assessment

Consider

Overall value, viability and safety

Justifiable educational aims (see VG1)
 Anticipated cost, time available, travel arrangements, accommodation, age/ability, disabled access, staff/student/transport availability, clashes (see VG2)
 Initial inspection visit of venue (s) (if appropriate). Previous experience/recommendations (see VG7)
 Aims, objectives, suitability, cost, safety, inclusion issues (see VG2 + 3)
 Level of interest, anticipated numbers, age/gender, ability/special needs, behaviour/inclusion/discrimination issues (see VG3)
 Staff available/interested. Anticipated deputy, assistants/volunteers– numbers, gender, competence, qualifications, experience, ratios. Staff cover required. (see VG6)
 Submit basic details of visit for initial internal approval, to obtain go ahead with bookings and detailed planning/preparations. For Category 4 Visits, which are more demanding and financially committing, the EVOLVE system should normally be used and LA approval gained. (see VG1 + 17)

Detailed arrangements

Precise numbers, age/gender, ability/special needs, behaviour/ inclusion/discrimination issues (see VG3)
 Appointed deputy, assistants/volunteers– numbers, gender, competence, police checks, qualifications, experience, training, first aid training, overnight supervision (see VG6)
 Group members, staff available, programme, gender mix (see VG6)
 Safety (risk assess), suitability, rules/procedures, sleeping arrangements, overnight security (see VG7)
 Written quality assurances of safety management systems – transport, accommodation, places to visit, activity instruction (see VG7 + 12)
 Dates/ times, staffing, cost, travel, accommodation, programme, hazards, behaviour, requirements/conditions (see VG13)
 Deposit/payment schedule, cancellation/refund policy, guarantees/conditions (see VG10)
 Type and extent of cover, especially re. cancellation, rescue/ medical costs, repatriation, exclusions, existing conditions (see VG10)
 Budget, records, separate non-private account (see VG10)
 Reputable firm, times, costs, pickup/drop off points, route, contingencies if breakdown or delay (see VG12)
 Seating, LA approved driver(s), additional adult, driver times (see VG12)
 Suitability, worksheets, route cards (see VG8)
 Travel, general locations – identify hazards, control measures, residual risk, acceptability. Discuss with other leaders - adapt and complete form, agree and sign. (see VG9)
 Individual health/fitness, medical/diet/special needs, consent for first aid/emergency treatments, swimming and hazardous activities (see VG13)
 Specific location, activities, group members. – identify hazards, control measures, residual risk, acceptability. Discuss with other

VISIT LEADER CHECKLIST**Check**

- Roles and responsibilities
- Staff briefing/training

- Kit lists
- Student briefing/training

- Parent briefing
(if appropriate)
- Medical/diet/special needs
- First Aid/Accident records
- Group Lists

- Emergency procedure
- LA Visits Guidance
- Final Approval

**Additional Items for Travel
Abroad/Home exchanges**

- Travel agent/ tour operator
- Passport
- EHIC card
- Foreign Currency/
Travellers Cheques
- Insurance

- Home/family suitability
- Emergency procedure
- Activity programme
-

**Additional Items for
Adventurous Activities and
Hazardous Environments**

- AALS/LOTC Badge
- Instructor qualifications
- Staff competencies
- Equipment
- Clothing
- First Aid

- Water hazards
- Plan B

Consider

leaders - complete form, agree and sign. (see VG9)
 Organisation of who, what, where, when (see VG5 + 14)
 Objectives, individual roles/ responsibilities, discuss and agree risk assessments (see VG14)
 Clothing and equipment requirements (see VG13 + 15)
 Objectives, code of conduct, schedules, clothing/equipment (see VG15)
 Photos, maps, FAQ, safety concerns (see VG13)
 Allergies, illness, disabilities, diets, swimming ability, (see VG13)
 Personnel, first aid kit(s), accident/incident book (see VG5 + 14)
 Include special/medical needs and home contacts – give to Leaders and Emergency Contacts (see VG14)
 Contingencies, contacts, communication, action plans (see VG14)
 Check visit complies with LA/School Guidance (see VG1 + 2)
 Submit final plans (6 weeks before visit if possible) (see VG17)

(see VG11)

ABTA bonded
 Personal/Group? - allow time to obtain
 Individual - allow time to obtain
 Personal/Group - allow time to obtain, security,

 Check cover for all activities and medical/repatriation – inform re. existing medical conditions
 Appropriate vetting/checks
 Check young people can access help (confidential, if required)
 Check safety/suitability

(see VG8)

Check if using an outside provider
 Qualifications, experience, ethos
 Ensure competence
 Appropriate, maintained in good condition
 Suitable for conditions, emergency spares
 Higher level of qualification may be required for adventure activities or remote locations
 Particular care with risk assessment and supervision
 Other options in case planned activities unsafe

Guidance for users of EVOLVE

EVOLVE) is an online system for the recording, notification and approval of educational/offsite visits and activities. Most find EVOLVE easy to access and use, but the following Frequently Asked Questions may help to address any areas of uncertainty. There are also detailed User Guides available in the Resources (Documents/Policies) section on EVOLVE, and do not hesitate to contact the LA Educational Visits Officer (tel. 01482 392417 or email taff.bowles@eastriding.gov.uk) if you have any further questions.

1. **What is EVOLVE?**
2. **What are the benefits of EVOLVE?**
3. **What type of visits should EVOLVE be used for?**
4. **Who should have access to EVOLVE online?**
5. **How can you access EVOLVE online?**
6. **What are the options available on EVOLVE's home page?**
7. **Why is it important to complete "Staff Profile" first?**
8. **Who is responsible for the completion of a new visit form?**
9. **How is information entered for a new visit?**
10. **Where can users find guidance how to use EVOLVE?**
11. **How do you save visit details once they have been entered?**
12. **How can you view the whole form together?**
13. **Can the form be printed?**
14. **How can you move forwards and backwards within the form?**
15. **How can you make changes to the form?**
16. **What is the procedure for obtaining approval using EVOLVE?**
17. **How are visits assessed and approved using EVOLVE?**
18. **Will EVOLVE mean the end to all other paperwork associated with visits?**
19. **Does additional documentation (e.g. copies of risk assessments) need to be sent to the LA?**
20. **What does the status of approval mean?**
21. **How can late amendments be notified after approval has been given?**
22. **Why is there a page for a post-visit review and evaluation?**
23. **Is it possible to copy/clone a previous visit to save time when planning later a similar visit?**

1. What is EVOLVE?

EVOLVE is an online database for the recording, notification and approval of educational visits. It is primarily for the recording, notification and approval of Category 3 (UK residential), 4 (overseas) and “A” (high risk) visits, but some users may also decide to use it as a central record for all visits (including Category 1 and 2 day visits) – see further details below in Q.3 “What type of visits should use EVOLVE?”

2. What are the benefits of EVOLVE?

The key objective of EVOLVE is to provide an accessible, robust system for the recording, assessment and approval of offsite visits – in particular, Category 3 (UK residential), 4 (overseas) and “A” (high risk) visits - and to reduce the amount of time and paperwork required for this process, particularly with regard to providing information to Managers.

However, EVOLVE has many other benefits. For example, EVOLVE enables users to:

- access records and information about all past, ongoing and planned visits;
- access other relevant information and guidance that will encourage good practice to be followed (e.g. links to relevant sections of the Local Authority’s Visits Guidance, Generic Risk Assessments, Frequently Asked Questions etc.)
- access records of staff leadership qualifications, experience and training;
- record and save details of new visits online (hard copies can also be printed off);
- respond to a series of questions about the visit, in a way that prompts them to follow correct procedures and guidelines;
- receive extra guidance that will encourage good practice (Guidance notes are provided for each section);
- notify online all relevant levels of management of planned visits;
- be alerted to questions that have been unanswered;
- view, assess and approve all visits online;
- provide comments and view the feedback provided by other people;
- give a secure and robust means of approval;
- analyse data regarding past visits (e.g. number of overseas visits during the year);
- share, in a post visit review, examples of good practice and lessons learned;
- access an audit trail that shows clearly which people have given what information and when;
- copy and amend details of a previous visit as the foundation of a new visit;

3. What type of visits should EVOLVE be used for?

- EVOLVE is primarily for the recording, notification and approval of Category 3 (UK residential), 4 (overseas) and “A” (high risk) visits, but some establishments may also decide to use it as a central record for all visits (including Category 1 and 2 day visits) – see below for details;

Category 3 (UK residential), 4 (overseas) and “A” (high risk) visits

- EVOLVE must be used for the recording, notification and approval of all Category 3 (UK residential), 4 (overseas) and “A” (high risk) visits;
- Paper visit forms should not be sent to the LA unless, in exceptional circumstances, staff are unable to access or use the EVOLVE system for some reason - but please discuss the issue first with the LA Educational Visits Officer if there is a problem;

Category 1 and 2 (day) visits

- Category 1 and 2 day visits are assessed and approved internally, so managers should decide upon the most appropriate means of assessment and approval for these visits, and this should be stated clearly in the establishment’s own internal policy;
- Schools/establishments may choose not to use EVOLVE for Category 1 and 2 (day) visits, and a paper-based system may be considered more appropriate and efficient – this depends partly upon the size of school/establishment, the number and complexity of visits, and the availability of online facilities etc.
- However, most schools/establishments have decided to use EVOLVE for all visits, as EVOLVE can provide a complete database record of visits, together with staff qualifications and experience, that is easy to access from work, home or anywhere that has an online facility. EVOLVE also has the benefit of providing instant access to guidance that can assist leaders with the safe planning and preparation of visits.

- For schools, the headteacher and governors must decide which system is most appropriate to their own circumstances, and should make the procedures they require clear within the school's own Educational Visits policy and to all staff members.
- If a school/establishment chooses to use a paper-based system instead of EVOLVE for Category 1 and 2 (day) visits, the managers must decide on the most appropriate way of recording, assessing and approving visits. It is important that managers have sufficient information about visit proposals to be able to make informed judgements and to give reasonable feedback. A sample "Day Visits Form" is available on the Council's Offsite Visits website www.eriding.net (see Educational Visits section) and via the Documents section on EVOLVE, and this can be adapted if necessary to each user's needs.

4. Who will need access to EVOLVE?

Managers should ensure that all those who are involved in the planning, leadership, supervision or approval of offsite visits have access to EVOLVE online. In particular, the following should normally have their own usernames and passwords, and be able to access EVOLVE online:

- The Visit Organiser/Overall Group Leader of any visit
- Other Assistant Group Leaders involved (Volunteer Leaders should not normally need access)
- The Educational Visits Coordinator (in schools/academies)
- The Senior Manager or Headteacher (in schools/academies)
- The Deputy Manager/Headteacher, or designated Senior Staff member (in case the Senior Manager/Headteacher is not available on occasion)
- The Governor responsible for educational visits (in schools/academies)
- A designated Governor who can deputise - in case the Governor responsible is not available on occasion (in schools/academies)
- The Chair of Governors - if not the above (in schools/academies)
- Any member of staff who acts as an Emergency Home Contact during a visit
- Any designated member(s) of the Admin. staff who may also need EVOLVE access

Access to EVOLVE information

- All authorised users will be able to access and view details of all the visits (past, present and future) that they have inputted themselves on EVOLVE using their own username/password.
- Staff who are designated as "managers" (e.g. EVCs and Headteachers) will have access to view all the school/establishment's visits (past/present and planned) and also additional information, such as the leadership experience and qualifications of staff within their school/establishment (it should be made clear, when requesting passwords, who should be given this additional status).
- Authorised personnel within the Local Authority, with key responsibilities for offsite visits, have access to view details on EVOLVE of all the visits (past, present and future) by all the county's schools/establishments, as well as each individual's leadership experience, training, and qualifications.

5. How can you access EVOLVE online?

- All requests for a new EVOLVE username and password should be made to the school's EVC or EVOLVE Administrator;
- Managers should keep an up-to-date record of all staff within the school/establishment who have access to EVOLVE;
- Access EVOLVE by going to their website (www.evolve.edufocus.co.uk) and logging in, using your username and password;
- Once you have logged in using your username and password, the EVOLVE homepage will open giving you a number of different options.

6. What are the options available on EVOLVE?

EVOLVE has the following option buttons that enable users to:

- **Add a new visit**
Add details of a new visit that you are planning. Information that has been inputted will be saved automatically once the first page has been completed and saved (by clicking the "Continue" button at the bottom of the page)
- **Track and edit saved (draft) visits** -
Users can return to a draft (unfinished) form at any time to amend or update it before submitting it for approval.

- **Track and view all submitted/past visits**
View all visits that have been saved, and all those previously submitted for approval (the current status of the visit application will be displayed).
- **View and edit staff profile**
Enter or update details of your past visit leadership experience, qualifications and training (this is vital information to enable managers to make informed judgements regarding leader competence). Visit leaders should ideally first complete this section before using EVOLVE and they should update their records regularly (at least annually).
- **View guidance and policy documents (via the Resources section)**
This provides access to the LA Offsite Visits Guidance and the OEAP National Guidance, together with other useful proformas, information, news and guidance.

7. Why is it important to complete “Staff Profile” first?

- **Before using EVOLVE, new leaders should first access their “Staff profile”** and record past leadership experience, qualifications and training with regard to offsite visits - this is vital information so that informed and reasonable judgements can be made regarding leader competence and suitability.
- **Access to this information** is only available to those managers who have been given authority to assess and approve visits.
- **Leadership experience** - staff are requested to record only the approximate number of visits that they have been involved in as either Overall Group Leader or Deputy/Assistant Leader. This provides a useful record of visit leadership experience.
- **Qualifications and training** - relevant qualifications and training courses attended (e.g. First Aid, Minibus Driving, Risk Management, Ski Course Organiser etc.) should also be recorded, and those responsible for approving visits or staff training should periodically check that qualifications are still current and valid.
- **Adventure Activity Providers** - the section also records if leaders are registered as LA Approved Adventure Activity Providers – this means that the individual has certain specialist outdoor qualifications, and has been approved by the Local Authority to instruct the activities in which they are qualified. Managers should ensure that the person instructs only activities for which they are appropriately qualified (further advice can be obtained from the County Educational Visits Officer)
- **Password** – it is also possible to change your password in this section.

8. Who is responsible for the completion of a new visit form?

- The Overall Group Leader or “Visit Organiser” (the person with overall responsibility for the planning and leadership of the visit) is responsible for the correct completion of a new visit form, and for its submission for approval. The Visit Organiser should use their own username/password to access EVOLVE, as they are accountable for the information and assurances provided on the form.

9. How is information entered for a new visit?

- Access EVOLVE and log onto the site using your personal username and password;
- From homepage - if not previously entered, access “My details” and enter information regarding personal leadership experience, training and qualifications before completing the form;
- Click on “Add” (a new visit);
- Record details of a new visit by answering all the questions in each section of the form;
- Each page must be completed before EVOLVE will allow you to submit the form;
- The selection of visit category will automatically affect the number of sections and questions that need answering e.g. the selection of a “Category 2” visit cuts out “Overnight Accommodation”, “High risk activities”, “Overseas Visits” and “LA Approval”. The menu displayed on the left of the page will change automatically once the first section has been completed;
- Refer, as necessary, to the additional guidance at the top of each section;
- Save the visit details after each section (or at any time) by clicking the “Continue” button at the bottom of the page;
- Click (at any time) on the “View” icon (on the top menu bar) to view the full form;
- Full approval might not be given if some of the questions remain answered so complete the form accordingly;

- Non – standard answers do not necessarily mean that the visit will not be approved, but they might need further justification. Consider the issues carefully and provide supplementary information if appropriate in the Additional Comments boxes.

10. Where can users find guidance how to use EVOLVE?

- **“?” Help button**

In the top right corner is a ? Help button which will enable users to find answers to frequently asked questions and to search for any other information regarding how to use EVOLVE.

11. How do you save visit details once they have been entered?

- **Saving information**

Information added to the database can be saved at any time by clicking the “Continue” button at the bottom of the page, or the “Save” button in the top menu bar.

12. How can you view the whole form together?

- **View whole form**

Click (at any time) on “View” (purple icon on the top menu bar) to view the whole form. The form can be printed at any time by clicking the Print icon.

13. Can the form be printed?

- **Printable version**

Click (at any time) on “View” (purple icon on the top menu bar) to view the whole form. Once the printable version is displayed, the form can be printed at any time by clicking the Print icon.

14. How can you move forwards and backwards within the form?

- **Movement forwards/backwards in the form**

Once the first section has been completed and saved, you can move to other pages by selecting the section required from the menu on the left of the page..

15. How can you make changes to the form?

- **Amending the form**

Draft forms can be amended at any time up until when the form is submitted for approval. After it has been submitted for approval, the Visit Organiser can send notes via EVOLVE to the EVC and/or Headteacher and/or the LA either to notify them of changes, or to recall the visit form so that amendments can be made to the form and resubmitted for approval.

16. What is the procedure for obtaining approval using EVOLVE?

Once the form has been completed, the Visit Organiser should:

- click on “View” (on the top menu bar);
- check that all questions have been answered satisfactorily – complete and amend form accordingly;
- once satisfied that the form has been completed fully and accurately, submit the form to the designated EVC for checking and approval. The managers will be able to check and approve the form and provide feedback. When the visit has been finally authorised, you will receive an email notification from the relevant manager. You will need to log on to EVOLVE to view the response from all the managers, including confirmation of whether or not the visit has been authorised.

If a hard copy of the form is required:

- click on “Print” icon (on the top menu bar);
- check that the form is complete and answered correctly, and then print off a hard copy of the form;

17. How are visits assessed and approved using EVOLVE?

Approval of Category 3 (UK residential), 4 (overseas) and “A” (high risk) visits

- EVOLVE must be used for the recording, notification and approval of Category 3 (UK residential), 4 (overseas) and “A” (high risk) visits;
- Once Visit Organisers have completed a visit form on EVOLVE, they should first submit the form for checking and approval by the EVC. For academies/independent establishments, the form will also be submitted to the LA Educational Visits Officer for checking and approval.

- The EVC (and the LA Visits Officer for academies/independent establishments) will check and add feedback comments to the form, and then forward the form to the Headteacher/Senior Manager for checking and approval.
- For academies/independent establishments, the approval of the Headteacher/Senior Manager will provide the final authorisation needed.
- For LA schools and establishments, the form will be automatically forwarded to the LA for final authorisation once the form has been approved by the Headteacher/Senior Manager.
- An email notification will be sent back to the Visit Organiser once the visit has been given final authorisation.

Approval of Category 1 and 2 visits

- Schools/establishments do not need to use EVOLVE for Category 1 and 2 (day) visits, as these visits are approved internally, and a paper-based system may be considered more appropriate and efficient – this depends partly upon the size of school/establishment, the number and complexity of visits, and the availability of online facilities etc.
- However, most schools/establishments normally decide to use EVOLVE for all visits, as EVOLVE can provide a central database record, together with a record of staff qualifications and experience, that is easy to access from work, home or anywhere that has an online facility. This may be particularly useful in the event of an incident or emergency. EVOLVE also has the benefit of additional guidance notes that prompt and assist leaders with the safe planning and preparation of visits.
- Managers must decide which system is most appropriate to their own circumstances, and should make the procedures they require clear within their own offsite visits policy and to all staff members.

18. Will EVOLVE mean the end to all other paperwork associated with visits?

- Some paperwork is still usually necessary, and may be requested by managers as part of the monitoring process. However, it is usually easier and more helpful if Visit Organisers attach any relevant documents (such as risk assessments, parent letters, itineraries etc.) onto the visit form in EVOLVE so that all managers can view and check them if necessary;
- Supporting documentation for a visit may be checked by the EVC/Headteacher/LA, as part of the approval and monitoring process, but this is often done on a spot-check basis according to need;
- If an incident occurs during a visit, any relevant documentation should normally be scanned and stored appropriately (on computer) for reference in case of possible future investigations.

19. Does additional documentation (e.g. copies of risk assessments) need to be sent to the LA?

- No accompanying documentation for any visit needs to be sent to the LA unless it is specifically requested as part of the LA spot check/monitoring process..

20. What does the status of approval mean?

Visits can be given one of the following approval status:

- “Not Approved” = significant changes needed
- “Outline Approval” = basically OK but needs minor changes or more information
- “Approved” = checked and considered satisfactory by manager
- “Authorised” = approved by lead manager

21. How can late amendments be notified after approval has been given?

- The visit details on EVOLVE can be amended at any time up until when the form is submitted for final approval. After approval has been given, it is still possible make late amendments
- Amendments to a few sections (Staffing, Attendees, and Departure/Return Times) can still be made directly by the Visit Organiser by clicking on the orange Edit button on the main form.
- For other amendments to the form, the Visit Organiser should open and view the form (by going to “Track” > “Draft” visits > Purple “View” icon) and click “Add Note” at the bottom of the form.
- Add and send a note to the EVC requesting that the form is recalled for further editing.
- The EVC can send a request to the Headteacher asking that the visit is returned by opening “Track”, locating the visit (in “Approved” folder) and clicking the light blue “Recall” icon (beside the purple “View” icon)
- The Headteacher will be notified and can unlock and return the visit form by opening “Track”, locating the visit (in “Approved” folder), opening the visit form by clicking on the purple “View” icon, and clicking “Return” at the bottom of the form. This will return the form to the EVC “Draft”

folder where it can be opened and edited by the EVC or returned to the Visit Organiser if requested.

- N.B. Once you have clicked Recall, the visit is NOT automatically returned to you - you will need to wait for the visit to be returned to you by the person with whom it is currently waiting.

22. Why is there a page for a post-visit review and evaluation?

- It is often useful for Visit Organisers, on return from a visit, to review the visit with the other visit leaders and relevant managers, and to record any examples of good practice and lessons learned that might assist with the planning and leadership of future visits.

23. Is it possible to clone (i.e. copy) a previous visit to save time when planning later a similar visit?

- It is possible to “Clone” a previous visit by following these instructions:
 1. View an existing form you wish to copy by going to “Track” > locate the visit (in “Draft” or “Submitted or “Approved” folder) > click Purple “View” icon
 2. Click the clone icon (two white sheets on a blue background) in top left corner of the form
 3. Confirm you want to copy the form.
 4. A new form will be created using the following details from the original form: *Name, Type, Purpose, Intended Outcomes, Leader Name, Age Group, Intended attendees (total, male and female), destination/providers, travel method and travel companies.*
 5. Edit (click on orange “Edit” icon) and complete the rest of the form