

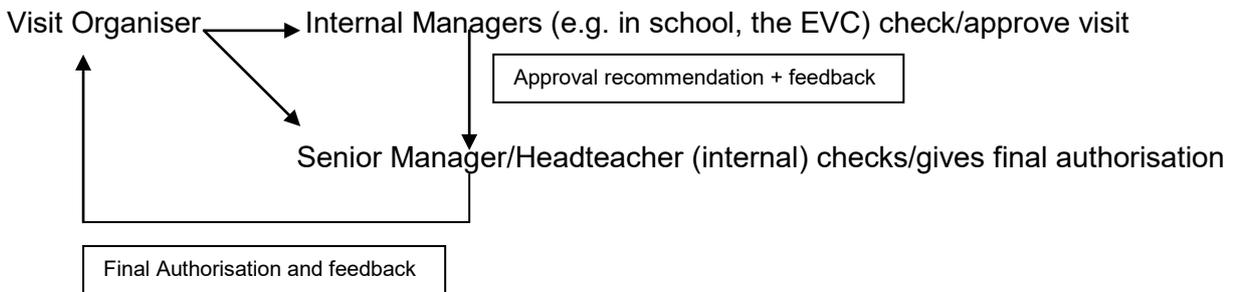
Chapter 17 - Seeking Visit Approval

(see also Chapter VG1 “Types of Visit and Planning/Approval Procedures”)

SUMMARY OF KEY POINTS – see rest of chapter below for full details

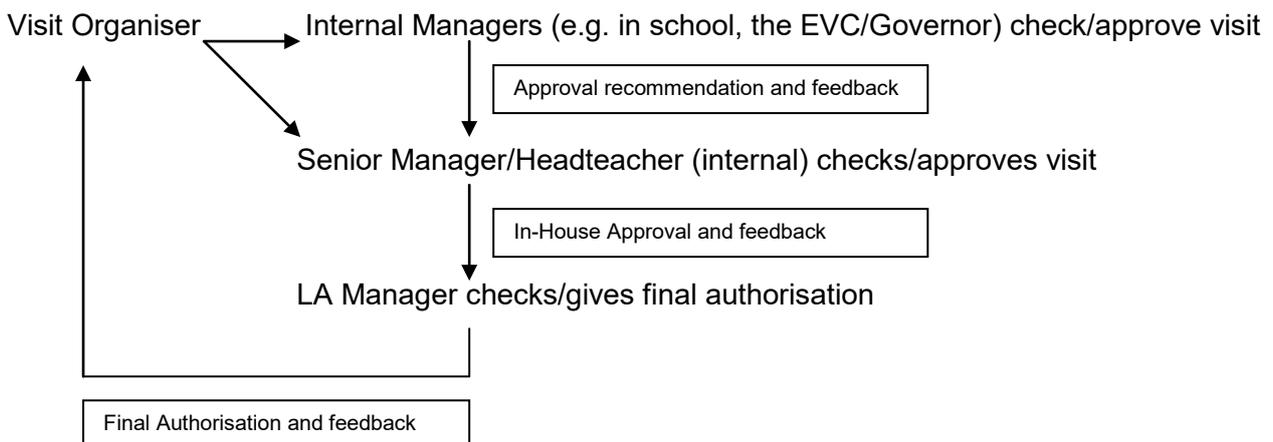
A. Day Visits (Category 1 and 2) not involving high risk activities or environments

- Use EVOLVE Online or Day Visits Form (depending upon own school/establishment policy)
- Submit at least 2 weeks in advance of visit



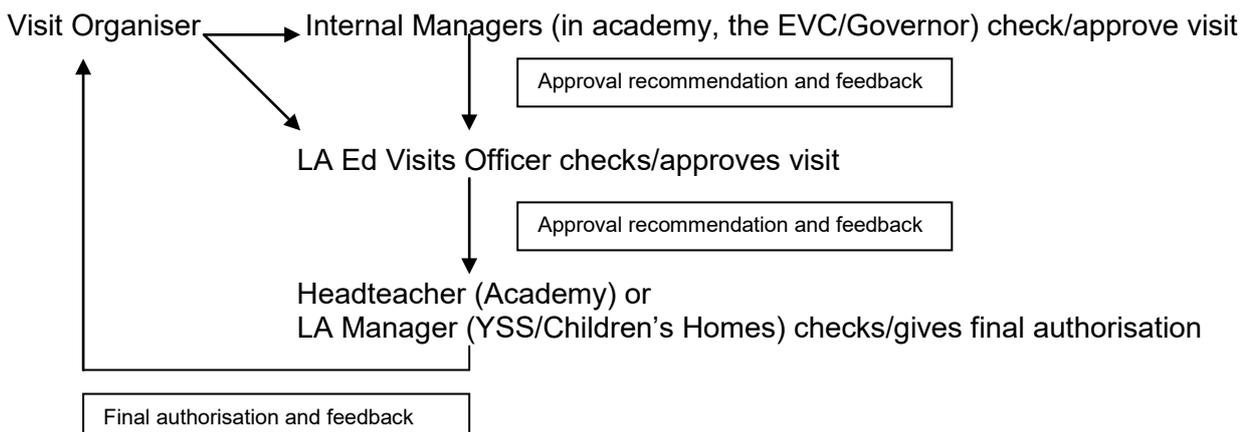
B. UK Residential (Category 3), Overseas(Category 4) and Visits involving High Risk Activities or Environments (Sub Category “A”) visits (In LA maintained schools/establishments only)

- Use EVOLVE Online only
- Submit at least 6 weeks in advance of visit



C. UK Residential (Category 3), Overseas(Category 4) and Visits involving High Risk Activities or Environments (Sub Category “A”) visits (Academies/Youth Support Services /Children’s Homes/other establishments)

- Use EVOLVE Online only
- Submit at least 6 weeks in advance of visit (submit Expeditions before financial commitment)



17.1 Which visits need approval?

- Details of all offsite visits need to be recorded, and then notified to and approved by the relevant authorities.
- No offsite visit should normally go ahead unless visit plans have been checked and clear approval has been given by all of the required authorised personnel, appropriate for each category of visit. When a visit is submitted for approval, each of the authorised personnel should check the details of the visit plans carefully to assess the safety and suitability of the visit.
- Each school/establishment's own Visits Policy should state clearly who is responsible and has authority internally to check and approve each category of visit.
- EVOLVE Online can be used to record and approve all visits. However, Category 1 and 2 (Day) visits do not necessarily need to be recorded on EVOLVE unless they involve significant hazardous activities/environments, as these visits are approved internally, and a paper-based system may be considered to be more appropriate and effective, depending upon the specific circumstances and needs of each establishment.

17.2 How are “Day” visits (Category 1 and 2) approved?

- Day Visits (Category 1 and 2) which do not involve “high risk activities and environments” (sub category “A”) require approval from internal managers only (school visits, for example, require final authorisation by the Headteacher, with additional checks and approval by the EVC where appropriate). These visits can be recorded and approved using either EVOLVE Online or a paper-based system.
- Managers should therefore decide which system for approving day visits is most appropriate to their own circumstances, and should ensure that the required procedures are clearly stated within their own Offsite Visits policy, and that they are fully understood by all staff members.
- If using a paper-based system, a sample "Day Visits" form can be downloaded either from the documents section on EVOLVE or from the Educational Visits webpage at www.eriding.net/Educational_visits. Whilst it is acceptable to adapt this form or to use alternative versions, it is essential – whatever format is used - that managers obtain suitable and sufficient information and assurances about each visit to make an informed and reasonable judgement. In the event of a serious incident occurring during a visit, managers might be asked to justify why they have approved a visit, so careful consideration should be given as to what, and how much, information about a visit is requested, and what assurances need to be given by the Visit Organiser.
- The following 10 key questions should form at least the basis of checks on all visit arrangements, including day visits (as recommended by the HSE 2005 report into the Glenridding Beck fatal incident):
 - what are the main objectives of the visit?
 - what is “plan B” if the main objectives cannot be achieved?
 - what could go wrong? Does the risk assessment cover:
 - ✓ the main activity
 - ✓ travel arrangements
 - ✓ emergency procedures
 - ✓ staff numbers, gender and skill mixes
 - ✓ generic and site-specific hazards and risks
 - ✓ variable hazards (including environmental and participants' personal abilities and “cut-off” points)
 - what information will be provided for parents?
 - what consents will be sought?
 - what opportunities will parents have to ask questions?
 - what assurances are there of the leader(s)' competencies?
 - what are the communication arrangements?
 - what are the arrangements for supervision, both during activities and free time – is there a code of conduct?
 - what are the arrangements for monitoring and reviewing the activity?
- Category 1 (Frequently recurring/repeated) Day Visits do not normally need a new form for each separate occasion – one generic form should be adequate to cover all similar visits. The Visit Organiser needs to ensure that the Senior Manager/Headteacher is made fully aware of the

normal arrangements (and possible variations) for such visits, so that blanket approval can be given.

17.3 How are Category 3 (UK residential), 4 (overseas) and “A” (high risk) visits assessed and approved?

- 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.
- All the managers are able to add feedback comments to the form, and to send messages to each other and the Visit Organiser. All of these added notes are recorded on the form for everyone to view.
- An email notification will be sent back to the Visit Organiser once the visit has been given final authorisation.

17.4 What is the procedure for assessing and approving offsite visits using EVOLVE online?

For LA Maintained Schools

Cat 1 and 2 Day Visits

The approval chain is shown below:

Visit Organiser > EVC > Headteacher authorisation

Cat 3 (UK residential), Cat 4 (Overseas) and Cat “A” (Adventurous/High Risk) Visits

The approval chain is shown below:

Visit Organiser > EVC > Headteacher > LA Visits Officer authorisation

For Academies (and other establishments that are independent of the LA)

Cat 1 and 2 Day Visits

The approval chain is shown below:

Visit Organiser > EVC > Headteacher authorisation

Cat 3 (UK residential), Cat 4 (Overseas) and Cat “A” (Adventurous/High Risk) Visits

The approval chain is shown below:

Visit Organiser > LA Visits Officer and EVC > EVC > Headteacher authorisation

17.6 When should visit forms be submitted for checking and approval?

- Visit forms must be submitted for approval early enough, in order that there is sufficient time available for:
 - all relevant arrangements to be made;
 - managers to give appropriate feedback;
 - Visit Organisers to respond, and to make any changes required, as a consequence of the feedback given, or if a visit is not approved.

Category 1 and 2 (Day) Visits

- Completed visit forms should be submitted for checking and approval as early as possible, preferably no later than 2 weeks before the planned visit.

Category 3 (UK Residential), 4 (Overseas) and “A” (High Risk) Visits

- Completed visit forms should be submitted for checking and approval as early as possible, preferably no later than 6 weeks before the planned visit.
- For visits involving significant financial commitment (e.g. commercially-led Overseas Expeditions) Visit Organisers should not make any firm bookings until they have at least received Outline Approval from the Senior Manager/Headteacher and the Local Authority – usually at least 6 months in advance. Once Outline Approval has been given, further details

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about the visit can be added, before submitting the form again to all the relevant managers for Final Approval at least 6 weeks before the visit.