

CODE OF PRACTICE (CP)

9. Monitoring Standards and Quality Assurance of Visits

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For further information, see the following webpage from the Outdoor Education Adviser Panel national guidance via www.oeapng.info

- 9.1 It is recommended that all those responsible for overseeing Offsite Visits should maintain a system of monitoring as a means of quality assurance, to check that suitable standards of safe practice are upheld, and to provide a helpful and effective means of feedback and guidance to the Visit Leaders and managers. The monitoring of offsite visits can be undertaken by internally by suitable managers (for example, in schools by the Headteacher or Educational Visits Coordinator or Head of Department) or externally by an appropriate Local Authority manager (for example, the Youth and Family Support Manager, the Duke of Edinburgh Award Officer, or the LA Educational Visits Officer)
- 9.2 The Local Authority's Educational Visits Officer will normally undertake monitoring in the following ways:
- By asking Headteachers/Senior Managers to undertake an online "Manager Review" (accessible via the front page of ROVER online) of their own school/establishment's systems and procedures for managing and leading offsite visits;
 - By arranged appointment with the Headteacher/Senior Manager to visit the school/establishment to review all relevant procedures and documentation, including the school/establishment's own Offsite Visits policy, risk assessments and plans for specific visits;
 - By arranged appointment with Headteacher/Senior Manager/Overall Group Leader to accompany and observe a visit in progress (see appendix CPA 7.1);
 - By an unannounced spot-check of a visit in progress to monitor health and safety provision (see appendix CPA 7.1);
 - By investigations of accidents and "near-miss" reports.
- 9.3 Whilst all categories of visit can be observed, there should normally be a focus on those visits involving "high-risk" activities or environments. Monitoring visits should be conducted in a positive and supportive manner.
- 9.4 During monitoring visits to schools/establishments, managers may be asked to confirm and illustrate the following :
- ✓ the school/establishment has its own Offsite/Educational Visits policy and that the policy complies with the Local Authority's "Guidance for the Management and Leadership of Offsite Visits";
 - ✓ a suitable EVC has been appointment and trained;
 - ✓ visits are correctly notified to and approved by managers;
 - ✓ appropriate emergency/delayed return procedures are in place;
 - ✓ review and monitoring systems are in place;
 - ✓ systems are in place for reporting/recording accidents, incidents and near misses;
 - ✓ records are available of previous educational visits;

CODE OF PRACTICE (CP)

9. Monitoring Standards and Quality Assurance of Visits

- ✓ records are available of staff leadership experience, training and qualifications;
- ✓ effective risk assessment and management procedures;

9.5 During the observation of a visit in progress, the Overall Group Leader might be asked to demonstrate the following (see detailed checklist in Appendix CPA 7.1):

- ✓ careful and thorough organisation, planning and preparation;
- ✓ suitable and competent adult supervision and leadership, with clearly defined roles and responsibilities (e.g. an appointed deputy leader), and appropriately qualified and experienced leaders of activities;
- ✓ adequate assessment and management of risks, both during the planning stage and ongoing during the visit (including an active involvement by the group members);
- ✓ checking the suitability and safety of external service providers (if appropriate);
- ✓ available list of names and contact details of all group members and parents/next of kin;
- ✓ available list of group names with details of special/medical needs;
- ✓ adequate insurance arrangements;
- ✓ appropriate and sufficient clothing (e.g. waterproofs) and equipment (e.g. compasses);
- ✓ transport arrangements in accordance with ERYC guidance;
- ✓ contingency plans for delayed returns;
- ✓ correct and sufficient information provided to parents/guardians;
- ✓ relevant consent and medical/special needs information received by parents/guardians;
- ✓ suitable first aid arrangements;
- ✓ all leaders, including volunteers, are fully briefed and aware of roles and responsibilities;
- ✓ suitable and reliable system of communication between staff;
- ✓ contingencies for changes in circumstances (i.e. "plan B");
- ✓ established Emergency Home Contact(s) with group and visit details;
- ✓ all staff and Emergency Home Contact, with clear knowledge of emergency procedures;
- ✓ an itinerary that is suitable for the age, experience and aptitude of the group members;
- ✓ correct use of notification and approval procedures;
- ✓ appropriate action taken in response to any advice and guidance given;
- ✓ accident, incident and near miss reporting/recording and investigation systems.

9.6 In addition, for visits abroad:

- ✓ contact details of the FCO and British Embassy (where appropriate);

CODE OF PRACTICE (CP)

9. Monitoring Standards and Quality Assurance of Visits

- ✓ suitable vetting and briefing of host families (for Homestay/Exchange visits);
- ✓ appropriate precautions taken against health risks, and adequate insurance to cover medical treatment.

Monitoring feedback and response

- 9.6 Wherever possible, verbal feedback and recommendations should be given to the Overall Group Leader before the Manager departs, but a detailed written report should subsequently be given to the Visit Leader(s) and appropriate Managers. Any feedback given should be both constructive and beneficial. A record should be kept of any feedback given.
- 9.7 If the monitoring officer determines that all or part of the visit should cease, the Headteacher/Senior Manager should be contacted immediately. This action will only be taken where there are serious and imminent risks to the health and safety of young people or members of the public.

Internal monitoring

- 9.8 Managers (e.g. in schools, the Headteacher and/or the Educational Visits Coordinator) should regularly check their own school/establishment's systems and procedures for managing and leading offsite visits – for example, by undertaking an online "Manager Review" (accessible via the front page of ROVER online). Details of the Review findings and agreed action plans should be submitted to other relevant managers (for example - in schools, the Chair of Governors) and the LA Educational Visits Officer;
- 9.9 Managers (e.g. in schools, the Headteacher and/or the Educational Visits Coordinator) should also occasionally monitor visits that are led by staff from their own school/establishment to ensure that good practice and correct procedures are followed, and to verify the written responses and assurances provided by the Visit Organiser when sending visit details for approval. These monitoring visits can be either announced or unannounced.
- 9.10 Managers should check routinely that their school/establishment's internal systems are operating smoothly and effectively (for example, checks can be made via ROVER Online that all visits are being submitted in good time and that visits are being approved correctly).
- 9.11 Managers should sometimes arrange to meet the Visit Leaders after they have returned from a visit to review the visit and record lessons to be learned for future visits;
- 9.12 It is good practice to maintain a written record of all forms of monitoring, as this can be important should an investigation of the school/establishment's procedures ever be required.