

HSP 25 ORGANISING **EDUCATIONAL VISITS** **PROCEDURE AND** **GUIDANCE**



Corporate Health and Safety Procedure

Type of document: HSP 25 Organising Educational Visits
Procedure and Guidance

Version: 4

Date of Review: 2025-08-01



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Associated Forms

- FORM 25.1 Offsite Visit Planning Checklist
- FORM 25.2 Enquiry to Proposed Provider of Services Activities or Accommodation
- FORM 25.3 Accommodation Arrival Checklist
- FORM 25.4 Medical and Consent Information
- FORM 25.5a Trip Risk Assessment Template
- FORM 25.5b General Trip Risk Assessment Example
- FORM 25.5c Residential Trip Risk Assessment Example
- FORM 25.6 Event Specific Information
- FORM 25.7a Emergency Card for Group Leader
- FORM 25.7b Emergency Card for School or Service

Associated Guidance

- GUI 25.1 Basic Principles for Safe Practice for Visits
- GUI 25.2 Categories and Types of Visits
- GUI 25.3 Visits to Countries Other Than That of Residence
- GUI 25.4 EVOLVE Guidance - Management Requirement
- GUI 25.5a EVOLVE Head Teacher Starter Guide LA and Collaboration
- GUI 25.5b EVOLVE EVC Starter Guide – LA
- GUI 25.5c EVOLVE Staff Starter Guide – All
- GUI 25.6 Avoiding Accidents and Emergencies

All Forms and Guidance is available on EVOLVE or by emailing the
Health.SafetyAdvice@haringey.gov.uk

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1. Introduction

- 1.1 Learning outdoors is an important part of every young person's development in the broadest sense. Children and young people may return stimulated, enthused and with much greater knowledge about themselves, their own physical skills, and a deeper understanding of the environment they live in.
- 1.2 In Children & Young People's Services (CYPS) there are many opportunities for children and young people to experience challenging, rewarding, and exciting visits and activities. The range of opportunities is increasing, with many new and exciting locations to visit and greater opportunities for learning outside the classroom. Such activities, when planned as part of the school curriculum, are proven to contribute to the raising of achievement. Such activities of course form an equally important and valued element of the programme for a wide variety of settings including youth groups and nursery settings.
- 1.3 Large numbers of children and young people in Haringey enjoy a wide range of visits and off-site activities each year. An increasing number of schools and settings are using their own grounds for 'adventure'. Almost all take place without incident, and CYPS employees including school staff are encouraged to continue to organise visits and activities with the same high level of safety for children and young people in their care.
- 1.4 This document aims to provide clear guidance for organising educational visits and off-site activities. It contains advice and guidance for CYPS establishments, and links with both current Department for Education advice and notably the [National Guidance](#) published by the Outdoor Education Advisers Panel (OEAP). Cross-references are made throughout this publication.
- 1.5 It is not intended that this policy will reduce the number or range of educational visits and off-site activities but encourage continued safe practice for, and by, all involved.

2. Background Information

- 2.1 Haringey Council (The Council) acknowledges the immense value of educational visits to children and young people and fully supports and encourages all off-site activities that are correctly planned, managed, and conducted. We believe that all establishments should strive for high quality educational visits in order to maximize the educational benefits to the children and young people taking part.
- 2.2 The Council has adopted the extensive advice offered through the [Outdoor Education Advisers Panel \(OEAP\)](#) for guidance in making essential decisions while planning and enjoying off-site activities and outdoor visits.
- 2.3 In the event of any apparent conflict between the establishments policy, The Council's procedure or OEAP National Guidance, The Council's procedure must be followed and clarification sought from the Corporate Health and Safety Team (LA) or the Educational Visits Coordinator (EVC).

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2.4 This Council guidance has been produced to make visits enjoyable, rewarding and as safe as possible. It summarises the procedures which should be followed by all Council employees in the management of visits and similar off-site activities within CYPS. Information contained in this guidance document applies to all staff and volunteers working in Council establishments including:

- Nursery schools, infant, junior and primary schools, secondary schools, and special schools.
- All extended school provision.
- All CYPS services.

2.5 Schools are reminded (in accordance with DfE guidance 'Health & Safety: Responsibilities and Duties for Schools', April 2022) that "Under section 29(5) of the Education Act 2002, local authorities have powers to direct health and safety matters relating to school premises or school activities taking place elsewhere in the following types of school:

- Community Schools
- Voluntary Controlled Schools
- Community Special Schools
- Maintained Nursery Schools
- Pupil referral Units.

3. Legal Framework

3.1 The Health and Safety at Work etc Act 1974 requires employers to do all that is reasonably practicable to ensure the health, safety, and welfare at work of employees and non-employees who are affected by their undertaking. This includes off-site activities.

3.2 The Management of Health and Safety at Work Regulations 1999 require that employers:

- Produce a health and safety policy linked to risk assessment
- Have in place systems for reporting accidents and incidents
- Produce and implement risk assessments
- Develop measures to control those risks including training and the provision of information
- Appoint people competent to carry out specific tasks
- Develop emergency procedures
- Monitor and review procedures and practice.

3.3 For community schools, community special schools, voluntary controlled schools, maintained nursery schools, pupil referral units and so on, the employer is The Council. These establishments **must** adhere to the requirements contained in this document. For foundation schools, foundation special schools, voluntary aided schools, academies, free schools and independent schools, the employer is usually the governing body or proprietor.

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- 3.4 Those establishments that enter into a specific Health and Safety Service Level Agreement (SLA) with The Council will use this guidance.
- 3.5 Those establishments who have their own competent health and safety advisor are welcome to use this guidance but are not obliged to do so. If not using the guidance, they should ensure that the systems in place are equally as robust.
- 3.6 The Management of Health and Safety at Work Regulations 1999 places a duty on the organiser to carry out a suitable and sufficient risk assessment of the various activities undertaken, and to ensure that if other persons (for example, instructors) take charge of activities, then those persons should provide a suitable and sufficient risk assessment for those activities.
- 3.7 Common law expects people acting 'in loco parentis' to take the same care as would a reasonable and careful parent. This duty applies to all educational visits and off-site activities and cannot be delegated. The principle applies to all young people in school and youth settings.
- 3.8 In addition, there is a higher duty of care on teachers and other professional staff as a consequence of greater knowledge they are assumed to have of children and of specialised activities. The level of judgement expected of staff is related to that individual's knowledge, experience and training.
- 3.9 In the event of an accident and any Health & Safety Executive (HSE) intervention documentation will be assessed as evidence to establish if the organisation did or did not take reasonable care. If the conclusion is that the organisation did not take reasonable care, the Group Leader, Head Teacher / Service Manager and/or The Council could be prosecuted. A key part of any investigation would be whether the employer's health and safety policy and procedures are adequate and had been followed by its employees.

4. Roles and Responsibilities

Extensive guidance on roles and responsibilities on educational visits can be found in the OEAP National Guidance. The following is a summary of the main features relating to the roles with key health and safety responsibilities.

4.1 Council's Corporate Health and Safety Team (LA) will:

- Make this document available to all Council schools, CYPS service areas and schools with SLA agreements via EVOLVE. The Council will provide, support, advice and access to training related to the management of visits.
- Responsible for reviewing and approving Category B offsite activities on EVOLVE (see section 5 – Categories and Types of Educational Visits).
- The LA will review all entries and relevant documentation and either:
 - **Approve** (trip has been approved and no further action is required)

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- **Process** (trip will not be approved due to insufficient time to review and process therefore school will accept liability if going ahead with the trip)
- **Add notes/comments** (further information may be required or the school may have to review additional considerations) before approval or processing.

4.2 School Governing Bodies will ensure that:

- Where The Council is the employer, the school adheres to the requirements contained in this guidance document.
- Where the governing body is the employer, it must ensure that the CYPS guidance is formally adopted or a procedure at least as robust is developed that meets the requirements detailed in the DfE advice, and with significant and clear reference to the OEAP National Guidance.
- All governing bodies should have a clear procedure regarding where approval from governors is required and where approval has been delegated to the Head Teacher.

4.3 Head Teachers and Service Managers will:

- Ensure the CYPS procedure and school procedure are adhered to at all times.
- Ensure that staff leading and accompanying visits have the required training, competence and experience.
- Ensures documentation is correct and complete (all trips).
- Ensures the FORM 25.1 Offsite Visit Planning Checklist has been completed, and the relevant evidence is available and sufficient.
- Reviews and approves Category A visits on EVOLVE (see section 5 – Categories and Types of Educational Visits).

Head Teacher / Service Manager can delegate tasks to the EVC or Group Leader who undertakes much of the planning and organisation.

4.4 Educational Visit Coordinators (EVC's)

All schools and CYPS Services should nominate an Educational Visits Coordinator (EVC). This is not a legal requirement but is strongly recommended as 'good practice'.

The EVC:

- Will be appointed by, and will act on behalf of, the Head Teacher / Service Manager.
- Should be specifically competent, often having practical experience in leading and managing a range of visits similar to those typically run by the establishment. Commonly, but not exclusively, such competence will be identified in a person on the senior management team of the school / service.

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- Will be the principal contact with the LA over visits planned by the school / service.
- Will be involved in the planning and management of visits including adventurous activities led by the school / service.
- Will undertake EVC Training and refresher training made available to them.
- Should ensure that the DfE advice, this CYPS guidance, the schools / services own procedure, and/or any other relevant documentation is readily available for access by staff including the OEAP National Guidance as a key planning tool.
- Is required to enter visits on to EVOLVE and make these available to the LA where requested, as part of our statutory monitoring role where The Council is the employer.
- Ensures documentation is correct and complete (all trips).
- Ensures the FORM 25.1 Offsite Visit Planning Checklist has been completed, and the relevant evidence is available and sufficient.
- With permission from the Head Teacher / Service Manager, review and approve Category A visits on EVOLVE.
- The EVC should be specifically competent, ideally with practical experience in leading and managing a range of visits similar to those typically run by the establishment.
- The EVC should support the head of establishment in ensuring that competent staff are assigned to lead and accompany visits, give approval, and make decisions when necessary.
- The EVC must ensure that a procedure is in place for educational and off-site visits, and that this is updated when necessary. This should be readily available to staff via their establishment's own EVOLVE Resources section.
- Should seek advice from the LA, guidance on OEAP or other personnel where necessary.

4.5 Group Leader

The Group Leader has overall responsibility for the supervision, conduct and safety of young people on the visit. They will:

- Organise the trips.
- Ensures relevant documentation is collated and shared with staff / parents / pupils.
- Inform parents in advance of the nature of the visit and gain their consent and details of medical requirements.
- Undertake a risk assessment identifying the main risks and how these will be controlled. Where necessary this will require a pre-visit.

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- Ensures the FORM 25.1 Offsite Visit Planning Checklist has been completed and the relevant evidence is available and sufficient.
- Ensures all the relevant information is included on the EVOLVE trip entry and submitted to the relevant person for approval (EVC / Head Teacher / LA).
- Continually risk assess during the visit and encourage young people to take an active role in this process.

5. Competence to Lead

5.1 The single most important factor in ensuring the safety of participants involved in an educational visit or activity is the competence of the group leader.

5.2 The EVC and Head Teacher / Service Manager should therefore consider the following when assessing the competence of a member of staff to lead a visit:

- What is the leader's reason for undertaking the visit?
- Is the leader an employee?
- Has the leader a real sense of responsibility, extending beyond the teaching of the subject to concern for the participants well-being?
- Does the leader possess the necessary organising ability?
- Is the leader competent in risk assessment and risk management?
- What experience has the leader in leading, or assisting in the leading of similar visits or activities?
- What experience has the leader of the environment and geographical area chosen?
- Does the leader possess appropriate qualifications?
- If appropriate, what is the leader's personal level of skill in the activity, and fitness level?
- Is the leader aware of, and able to comply with, all relevant guidelines?

5.3 The establishment should contact the LA if there is doubt regarding the competence of a member of staff to lead an educational visit. CYPS has access to independent technical experts to assist in making decisions on competence to lead, especially for adventurous activities.

5.4 See GUI 25.1 for Basic Principles for Safe Practice for Visits.

5.5 Adventurous Activities for Which There Are No Specific National Qualifications

5.5.1 In the absence of formal, recognised qualifications for some adventurous activities, it is good practice for group leaders to hold qualifications in closely related activities. The level of the qualification required needs to be matched to the levels of hazard and risk.

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5.5.2 Group leaders wishing to lead such activities must seek full approval for the visit from their EVC and Head Teacher / Service Manager, and the LA.

5.6 Supervision and Staffing Ratios

5.6.1 Young People on visits must be adequately supported and supervised at all times.

5.6.2 The level of supervision should be based on **risk assessment** for the specific visit, and will be determined by such factors as:

- The type, risk, and duration of the activity
- The nature and requirements of individuals within the group, including consideration of special and additional needs
- The experience and competence of staff and other adults
- The venue, time of year and prevailing/predicted environmental conditions
- The contingency or Plan B options.

5.6.2 We expect the group leader, EVC and Head Teacher / Service Manager to make a professional judgement regarding the appropriate level and suitability of staffing for every visit. A visit must not go ahead where any of the above persons are not satisfied that an appropriate level of supervision exists.

5.6.3 The following ratios are therefore **only a guide** and do not overrule or replace professional judgement of the group leader, EVC and Head Teacher / Service Manager.

Lower Risk Activities (where the risk is similar to everyday life)	Number of Adults to Pupils
Nursery and Foundation Stage Pupils	1 adult to every 4 – 6 pupils
Key Stage 1 pupils	1 adult to every 4 – 6 pupils
Key Stage 2 pupils	1 adult to every 10 – 15 pupils
Key Stage 3, 4 and 5 pupils	1 adult to every 15 – 20 pupils

Higher Risk / Adventurous / Residential Visits	Number of Adults to Pupils
Key Stage 1 pupils	1 adult to every 2 pupils
Key Stage 2 pupils	1 adult to every 6 – 10 pupils
Key Stage 3, 4 and 5 pupils	1 adult to every 10 – 15 pupils

Remember – The group leader is responsible for the group at all times.

5.6.4 It is good practice for each supervisory adult to:

- Have a clear plan of the activity to be undertaken and its educational objectives.

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- Have a reasonable knowledge for the young people involved, including any **special educational needs, medical needs, or disabilities** (see GUI 25.2 Categories and Types of Visits).
- Possess prior knowledge of the venue.
- Carry a list/register of all group members and know who they are responsible for.
- Regularly check the group (head count etc).
- Have the means to contact the group leader if help is required.
- Continually monitor the appropriateness of the activity, the physical and mental condition and abilities of the group and the suitability of the prevailing weather conditions and so on.
- Clearly understand the emergency procedures and have access to a first aid kit.
- Group leaders should provide a full briefing to accompanying adults prior to the visit.

5.7 Teachers and Other Employees Children Accompanying Visits

- 5.7.1 If any adult accompanying the visit has a child or children in the party of pupils or young people, then one other adult must be added to the relevant minimum ratio.
- 5.7.2 It is acknowledged that some employees and volunteers could not help in educational visits unless their own children accompany them. However, group leaders and helpers who bring additional children will have potential conflicts of responsibility, which could have consequences for supervision levels and group safety.
- 5.7.3 It is therefore essential that EVC's / Head Teachers / Service Managers consider the implications of such requests, and those arrangements do not compromise the safety of other group members.
- 5.7.4 Where agreements are made to allow staff to bring their own children on a visit, this arrangement should be communicated to the parents of the other young people and identified within the risk assessment.

5.8 Child Protection / DBS

- 5.8.1 All employees and volunteers over the age of 16 involved in educational visits with young people will require Disclosure Barring Service (DBS) clearance where:
- Planned contact with the pupils/students will take place once a week or more.
 - Planned contact takes place on 4 or more occasions in a 30 day period.
 - Planned contact takes place overnight between 2.00am and 6.00am.
 - DBS checks must be renewed in line with local procedures (The Council renew every 3 years).

- 5.8.2 Occasional volunteers who are known to the school/setting, and who will not work with the pupils 'frequently, intensively or overnight' (as above) can accompany visits without DBS clearance. In this case those volunteers should not be allowed unsupervised contact with the children.

6. Categories and Types of Educational Visits

- 6.1 Visits will fall into a two category's approval / monitoring process:

6.1.1 **Category A** – visits vetted at school / service level only.

6.1.2 **Category B** – visits for which the LA must be asked to approve, preferably at the outset of planning. Approval from the LA is required for the following activities:

- Adventurous activities
- Residential visits
- Overseas visits (including expeditions)
- Exchange visits
- The Duke of Edinburgh's Award expeditions
- Other visits where the level of risk is like the visits listed above.

6.1.3 GUI 25.2 Categories and Types of Visits for explanation of the categories.

6.1.4 GUI 25.3 Visits to Countries Other Than That of Residence for additional considerations when organising trips abroad.

6.2 Checking the Competence of Organisations for Activities

6.2.1 Schools using an outside organisation to provide an activity must check the organisation has the appropriate safety standards and public liability insurance.

6.2.2 The [Council for Learning Outside the Classroom](#) (LOtC) awards the to organisations that meet nationally recognised standards.

6.2.3 Schools can check if an organisation holds the LOtC Quality Badge, click [here](#) to search.

6.2.4 If an organisation does not hold the badge, the school /service must ensure that they're an appropriate organisation to use. This will require completion of FORM 25.2 Enquiry to Proposed Provider of Services Activities or Accommodation and submit it to the LA prior to proceeding

6.2.5 The school should draft an agreement with the organisation that makes it clear what is everyone is responsible for and send it over to the LA for approval. This is especially important if they will be taking over supervision of the pupils.

6.3 Adventure Activities: Caving, Climbing, Trekking and Watersports

- 6.3.1 These kinds of activities must be risk assessed as part of the visit beforehand and are categorised as Category B and must be authorised by LA on EVOLVE.
- 6.3.2 Staff managing or leading visits must not decide to add such activities during the trip. They should always consider the abilities of the pupils when assessing risk.
- 6.3.3 Organisations need a licence to provide some adventure activities. Organisations that hold the LOtC Quality Badge should hold a licence for the activity they provide.
- 6.3.4 In the UK providers of adventurous activities must be licensed by the Adventurous Activities Licensing Authority (AALA). AALA is our guarantee that certain minimum standards are met by commercial providers of adventurous activities. If adventurous activities are to be undertaken in the UK then the Group Leader must ensure that the provider is licensed for those activities. Information about licensing is available on the HSE website.
- 6.3.5 All AALA licence visits require approval via the LA regardless of whether the group will be led by a school, service, or another licensed provider.
- 6.3.6 Where schools use providers of adventurous activities outside of the UK then particular attention must be taken in order to ensure that the quality of the provision is as we would want it to be. In order to achieve this, it is important to at least check the qualifications of the instructional staff.
- 6.3.7 When planning watersports and open water swimming, schools should consider the need for instructors and lifeguards.
- 6.3.8 A school should take particular care when using hotel swimming pools and other water-based leisure facilities that may not have a trained lifeguard on duty. Although there are no swimming-pool-specific health and safety laws, the OEAP provides useful advice about under taking adventure specialist activities, including swimming [Section 7 – Specific Types of Visit, Activity and Hazard](#).

6.4 Residential Visits

- 6.4.1 FORM 25.2 Enquiry to Proposed Provider of Services Activities or Accommodation must be completed if there is an element of instruction, staffing or guiding as part of the agreement with the accommodation provider, where they do not hold the LOtC Quality Badge.
- 6.4.2 Mixed Groups should, where possible, be accompanied by at least 1 male and 1 female member of staff. If a responsible adult is used such as a partner, parent or student, the relevant disclosure barring service checks must be obtained.

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- 6.4.3 For primary aged children it may be acceptable for female teachers only to accompany mixed groups, provided the EVC, Head Teacher, parents and staff involved are fully satisfied with this arrangement.
- 6.4.4 If the residential accommodation has not been used before, a preliminary visit is strongly recommended. If this is not practical, for example due to distance, the group leader should make sufficient enquiries with the accommodation to be satisfied that it will be suitable for the group involved.
- 6.4.5 On arrival it is advised that staff check out the accommodation, rooms, campsites and so on and report any damage to the head of the centre/manager before pupils access the rooms, see FORM 25.3 Accommodation Arrival Checklist.
- 6.4.6 Teachers should be accommodated on every floor where there are children or young people.
- 6.4.7 In the absence of 24 hours staffing of hotel / hostel reception areas, external doors and windows should be made secure to prevent unauthorised visitors or intruders.
- 6.4.8 All staff and young people should be aware of the emergency procedures and escape routes in the event of fire.
- 6.4.9 When planning an expedition of this type, the [following guidance from OEAP](#) must be considered:
- 4.4g Selecting External Providers and Facilities
 - 4.4h Using External Providers
 - 7.1L Camping
 - 4.2a Group Management and Supervision
 - 7.1x Swimming Pools
 - 8.1i Model Code of Conduct
 - 4.3h Adult Participants
 - 4.2c Reviewing
 - 6o Allergies and Anaphylaxis
 - 7.2p Drinking, Drugs and Smoking

6.5 Overseas Visits (Including Expeditions)

- 6.5.1 Trips abroad can present extra risks and need a higher level of risk assessment.
- 6.5.2 Schools should make sure that any organisation providing activities holds the LOfC Quality Badge or similar local accreditation.
- 6.5.3 The HSE does not cover incidents overseas. However, it can investigate work carried out in Britain to support the trip, such as a risk assessment. School staff could be liable under civil law for any injuries to the pupils due to negligence.

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6.5.4 If the trip includes significant risks, such as challenging terrain, a remote location or an extreme climate, the school should follow the guide to the [British Standard for adventurous activities outside of the United Kingdom](#) as the basis for its planning and risk assessment. Organisations employed by the school should follow this too. If they have a LOTC Badge, they follow this standard.

6.5.5 Schools should consider the Foreign and Commonwealth Office's detailed guidance on [safer adventure travel and volunteering overseas](#) and [foreign travel advice](#) when organising a visit abroad.

6.5.6 See also GUI 25.3 Visits to Countries Other Than That of Residence for additional considerations when organising trips abroad.

6.5.7 When planning an exchange visit, the [following guidance from OEAP](#) must be considered:

- 4.2a Group Management and Supervision
- 4.2b Residentials
- 4.3e Safeguarding
- 7.1f Exchanges and Homestays
- 7.1q Overseas Expeditions

6.6 Exchange Visits

6.6.1 The success of a foreign exchange is largely dependent on good relationships, planning and communication with staff in the host school. In particular group leaders should ensure:

- All group members have easy and accessible contact in the host country, preferably by telephone, with a member of their own staff.
- Children and young people are aware of the ground rules agreed between the party leader and the host family.
- Appropriate pairing arrangements are made.
- Host families are aware of any medical or dietary needs.
- There are clear arrangements for collecting and returning children and young people.
- The school retains a list of all children and young people involved (including host children) and their family names and addresses.
- Children and young people living with host families should have easy access by telephone to their teachers.
- Children and young people are briefed regarding emergency arrangements and encourage contact with their staff in case of anxiety or concern.
- Where foreign exchanges are organised by a UK school, and are of less than 28 days, or where private arrangements are made directly between parents (for any length of time), the requirement for DBS checks are lifted: the host parents (UK or abroad) would not need to be DBS checked. However, the staff that take the children and are responsible for their supervision on the trip would need to be DBS checked.

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- 6.6.2 Host families will not be subject to UK law. Group leaders should seek reassurances from the host school regarding procedures for vetting the suitability of host families.
- 6.6.3 The host school or placing agency should have appropriate measures in place for carrying out checks to ensure the health, safety and welfare of exchange children and young people.
- 6.6.4 If these are not in place the group leader should seek further assurances and/or reconsider whether the visit should take place.
- 6.6.5 When planning an exchange visit, the [following guidance from OEAP](#) must be considered:
 - 4.2a Group Management and Supervision
 - 4.2b Residentials
 - 4.3e Safeguarding
 - 7.1f Exchanges and Homestays
 - 7.1q Overseas Expeditions

6.7 The Duke of Edinburgh Award

- 6.7.1 The guidance in this document must be used when managing expeditions and other activities relating to the Duke of Edinburgh's Award (DOFE). When planning an expedition of this type, the [following guidance from OEAP](#) must be considered:
 - 7.1b Duke of Edinburgh's Award Expeditions
 - 7.1k Unaccompanied Expeditions
 - 3.2g Vetting and DBS Checks
 - 4.4g Selecting External Providers and Facilities
 - 4.4h Using External Providers
 - 3.2f AALA Licensing
 - 7.1g Overseas Expeditions
- 6.7.2 Responsibility for safety
 - 6.7.2.1 The national DOFE organisation has no direct involvement in the delivery of DOFE programmes, including expeditions. The DOFE licenses other organisations to deliver its programmes, but it plays no role in ensuring the health and safety of participants on expeditions.
 - 6.7.2.2 The Head Teacher / Service Manager is responsible for ensuring that employees are fully qualified and experienced and hold the relevant national governing body qualification for work in the outdoors.
 - 6.7.2.3 The qualified and experienced leader has full responsibility for the safety of the young people whilst out on expedition. Suitably experienced and competent assistant leaders and other adults should work under the direction of the group leader and must be competent in the task they are asked to undertake.

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6.7.3 Notification / approval procedures for expeditions

6.7.3.1 All DOFE expeditions are regarded as 'adventurous' and require LA approval.

6.7.3.2 In addition, if groups venture into DOFE's Wild Country Areas, then the appropriate Network Co-ordinator must be notified in line with guidance

6.7.4 Those organising expeditions need to be aware of the conditions and guidance in the DOFE's Handbook, Programmes File and Expedition Guide.

6.7.5 Details of the Wild Country Expedition Areas and Co-ordinators can be found on the [Duke of Edinburgh](#) website.

7. Process for the Approval of Visits

7.1 The general principles for checking proposals for visit safety rests on:

- The actual activity
- Where it is to be undertaken
- The ratio of supervising adults to pupils
- The competence of the leaders
- Risks associated with the visit being assessed
- The ability of the group

Health and safety law requires that activities are appropriately monitored but this monitoring only needs to be proportionate to the general level of risk to be expected.

7.2 Information for Parents, Guardians and Carers

7.2.1 Written consent from parents is not required for pupils to take part in the majority of off-site activities organised by a school (with the exception of Nursery age children) as most of these activities take place during school hours and are a normal part of a child's education at school. However, parents should be told where their child will be at all times and of any extra safety measures required.

7.2.2 Written consent is requested for activities that need a higher level of risk management or those that take place outside school hours.

7.2.3 A 'one off' consent form can be signed by parents when a child enrolls at a school. This will cover a child's participation in any of these types of activities throughout their time at the school. This includes adventure activities, off site sporting fixtures outside the school day, residential visits, and all off site activities for nursery schools which take place at any time (including during school holidays or at the weekend).

7.2.4 Again, parents should be told where their child will be at all times and of any extra safety measures required.

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- 7.2.5 Consent is needed for all visits organised by establishments other than schools.
- 7.2.6 We strongly recommend that schools / settings seek consent separately for a particular visit, especially for residential visits and adventurous activities. The FORM 25.4 Medical and Consent Information for a specific visit is available on EVOLVE.
- 7.3 All CYPS staff and schools / services undertaking educational visits **must** follow the system of approval outlined in this procedure except where specifically agreed with the LA.
- **Category A** visits must be recorded on EVOLVE by the EVC requesting the appropriate level of approval. The LA may request trip details as part of our statutory supporting and monitoring role.
 - **Category B** visits requiring LA approval, must be recorded on EVOLVE as soon as possible (preferably at outset) and approval must be submitted **at least 6 weeks before the visit commences. Approval for Category B visits will only be given online via EVOLVE.**
 - When Category B visits are submitted as above, the LA will approve the visit at least 1 week prior to the trip commencing to ensure final arrangements can be made.
 - If a Category B visit is not submitted within the timelines outlined, the LA cannot guarantee that the visit will be approved, and alternative arrangements may need to be put in place by the school / service for the visit to go ahead.
 - **Failure by staff to follow the Health and Safety at Work etc Act 1974 and a criminal offence.** Following a serious incident or tragedy a civil case for negligence against an employee is likely to use failure to follow an employer's policy / procedure and guidelines as evidence of a breach of the duty of care towards the injured party.
- 7.4 If you are not already using EVOLVE and require support, please contact health.safetyadvice@haringey.gov.uk
- 7.5 All visits should be approved by the EVC. The EVC will obtain approval from the Head Teacher / Service Manager. It may be required (on an individual school basis) to ensure that the school governing body are made aware of visits taking place.
- 7.6 The LA expect the EVC / Head Teacher / Service Manager and governing body (where applicable) to exercise appropriate professional judgement when approving visits and expect advice to be sought from ourselves when necessary.
- 7.7 **CYPS delegates all aspects of the approval to the Head Teacher / Service Manager for all visits not listed as requiring the LA approval.**
- 7.8 This delegation is conditional upon compliance with this procedure.

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- 7.9 If planning adventurous activities outside of the UK, please email the LA at an early stage of the planning, rather than to wait until an approval request is submitted on EVOLVE.

7.10 CYPS Service Areas

This procedure applies to all non-school areas of CYPS that undertake activities similar in nature to educational visits.

- 7.9.1 Each service will be required to identify suitably competent and qualified staff to undertake the role of the EVC and identify the Service Manager that will approve educational visits on behalf of the service. This person will usually be a senior member of staff within the service.

- 7.9.2 Where the procedure requires the approval of the Corporate Health and Safety Team this will be achieved using the EVOLVE system. It is recognised that some parts of CYPS have high levels of competence in leading visits, and this will be reflected in each services approval system and in some cases the level of delegation to services will be increased (via the EVOLVE system) to reflect this additional competence.

8. EVOLVE – Trip Management System

- 8.1 The Council require all schools and CYPS services to use the online planning and management tool EVOLVE for all off-site activities and outdoor visits.
- 8.2 EVOLVE is a management tool which is an efficient tool for planning and approving visits and contains a variety of features, is easy to use and offers assurances that learning outside the classroom is deemed safe for all. Access to EVOLVE can be found at [EVOLVE Sign In - London Borough of Haringey](#)
- 8.3 EVOLVE must be used for all off-site activities, residentials, overseas and adventurous visits (see GUI 25.2 Categories and Types of Visits).
- 8.4 If you are not already using EVOLVE and require support, please contact health.safetyadvice@haringey.gov.uk
- 8.5 Further guidance on the EVOLVE system and training, see:
- GUI 25.3 EVOLVE Guidance - Management Requirement
 - GUI 25.4a Head Teacher Starter Guide LA and Collaboration
 - GUI 25.4b EVC Starter Guide – LA
 - GUI 25.4c Staff Starter Guide – All
- 8.6 Once all the planning and preparation is completed (or nearly completed), it is recommended that the off-site activity is entered onto EVOLVE (and the relevant documentation) to begin the approval process.

9. Risk Assessment

- 9.1 Risk assessment is nothing more than a careful examination of what could cause real harm and suffering to people, together with an identification of the control measures necessary in order to reduce the risks to a level which, in the professional judgement of the person carrying out the risk assessment, is deemed to be acceptable.
- 9.2 The process is applicable to **all** visits. As with all areas of health and safety you need to adopt a sensible and proportionate approach to the management of risk while planning and undertaking educational visits. For further advice please see the HSE website.
- 9.3 There are three 'levels' of risk assessment. (Further guidance can be found in the risk assessment section of the HSE website.)
- 9.4 Generic and Venue – (normally already in place)**
- 9.4.1 These will apply to all visits of a particular type as the nature of the visit remains constant and the same general controls will apply each time. Typically, schools / services and venues will have generic risk assessments for routine visits to avoid unnecessary repetition when organising visits and to ensure that there is a consistent approach to managing risk.
- 9.4.2 The LA have produced a series of generic risk assessments. These are available in the Resources section of EVOLVE.
- 9.4.3 When using generic risk assessments, the Group Leader must ensure that the risk assessment is relevant to the proposed visit. The Group Leaders should ensure that the controls in the generic risk assessment are in place and evaluate if this is suitable and sufficient, or if further action is necessary. This should then be signed and dated by the Group Leader.
- 9.5 Event Specific Risk Assessment – (carried out before the visit takes place)**
- 9.5.1 This considers any significant hazards or risks relating to a visit that are not covered within the generic risk assessment, and should take into account the venue, activities, group, transport, plan B and so on.
- 9.5.2 'Significant' implies those hazards that could result in serious harm or affect several people. The process should identify the hazards, who might be affected by them, and the measures in place to control the risks.
- 9.5.3 The risk assessment must be recorded (normally by the Group Leader), using the FORM 25.5a Trip Risk Assessment Template (or alternative) and approved by the EVC / Head Teacher before the visit takes place.
- 9.6 On-going – (carried out continuously throughout the visit)**
- 9.6.1 The on-going monitoring of all aspects of the visit by the Group Leader and other staff is the single most important aspect of risk management of visits, and hence safety.

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- 9.6.2 Risks should be monitored throughout the visit, and where appropriate activities must be modified or curtailed (for example, Plan B) to suit changed or changing circumstances. **This is the responsibility of all involved in the visit, not just the Group Leader.**
- 9.6.3 It is not necessary to record on-going risk assessments during the visit, although notes of significant events or decisions can assist the post-visit review following an incident or accident, FORM 25.6 Event Specific Information can be used.
- 9.6.4 An activity should only take place / continue if, in the professional judgement of the Group Leader and / or supervising members of staff, the residual risk following implementation of any control measures is deemed to be acceptable.
- 9.7 Relevant aspects of the risk assessment process should be shared with staff and helpers involved in the visit, as well as participants and where appropriate parents.
- 9.8 Participants who are involved in a visit's planning and organisation, and who are well prepared, will make more informed decisions and will be less at risk. It is therefore good practice to involve participants in the risk assessment process.
- 9.10 When submitting a trip on EVOLVE various risk assessments maybe required. The following risk assessments are available in the Resources Section of EVOLVE as examples:
- FORM 25.5a Trip Risk Assessment Template
 - FORM 25.5b General Trip Risk Assessment Example
 - FORM 25.5c Residential Trip Risk Assessment Example

10. Emergency Procedures

- 10.1 All schools and services should consider the need for robust emergency arrangements as part of the visit planning and risk assessment process, see GUI 25.6 Avoiding Accidents and Emergencies for further information.
- 10.2 All staff involved in a visit should be aware of the action to be taken in the event of an emergency.
- 10.3 It is vital that **all staff** understand the first aid and emergency procedures, not just the Group Leader. Particular consideration should be given to participants that have special educational needs or medical conditions.
- 10.4 The Group Leader must make all adults accompanying a group aware of the emergency procedures that will apply. Each adult should be provided with an emergency telephone number.
- 10.5 The Head Teacher / Service Manager / EVC must ensure that Group Leaders have telephone numbers for a 24-hour standby person based contact. The emergency contacts must be available 24/7.

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10.6 Groups must not be in the position of having to speak to leave a message on an answer phone. During the normal working day the emergency contact number may well be the school / service number but must not be the answer phone.

10.7 For all visits:

- A completed: **FORM 25.7a Emergency Card for Group Leader** must be with the Group Leader at all times.
- Where the emergency contacts will not be at their workplace during the visit, a completed **FORM 25.7b Emergency Card for School or Service** must be with the Emergency Contact(s) at all times.

10.6 The LA uses the Emergency Planning and Business Continuity Team for out of office hours emergency support for serious incidents – where the scale / seriousness of the event may be beyond the capacity of the Group Leader and School / Service emergency contacts.

To report an incident please call:

- 9am to 5pm: **020 8489 3334**
- 5pm to 9am: **020 8489 0000** (ask for the Duty Emergency Planning Officer).

10.7 Parents should be given the number of the school office / service team and a number for the 24 hour contact person in case they need to contact the group in an emergency.

10.8 Should parents need to contact the group in an emergency it is usually better if they do not do this directly, since the Group Leader is likely to be busy with the group and not in a position to make an immediate plan for a course of action.

10.9 It is quite likely that some discussion with the contact person would be helpful. The safety of the group, and especially the children, is of paramount importance.

10.10 During the activity the Group Leader must take whatever steps are necessary to ensure their safety, even if this means a last minute cancellation or change of activity.

10.11 Prior to an activity, if it is felt that the behaviour of an individual child is likely to compromise the safety of others or the good name of the School / Service, the Group Leader should discuss with the Head Teacher / Service Manager / EVC the possibility of excluding the child from the activity.

10.12 Serious Untoward Incidents (SUI)

10.12.1 A 'serious untoward incident' (SUI) is something out of the ordinary or unexpected. It is an incident – or a series of incidents – that, if left unattended, may pose a risk to people that use a service or the health and safety of staff, visitors and others.

10.12.2 It may therefore be an incident where:

- our actions may be open to question;

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- where we need to be aware that poor practice has taken place so that we can alert others to potential difficulties or even danger;
- or, simply, where a person using a service has taken action which may be reported in the press, for example, suicide.

10.12.3 What is the purpose of this procedure?

- SUI reporting helps to ensure that Haringey Council is prepared to deal with enquiries from elected members, public, staff, people that use our services, media and other stakeholders.
- This is essential if the council is to maintain public confidence in its services.

10.12.4 The procedure is designed to make sure that senior managers, the press office and elected members are made aware of these incidents as soon as possible after their occurrence.

10.12.5 It is important that Haringey Council gives support to frontline staff dealing with difficult situations.

10.12.6 This procedure means they can share responsibility and information about such cases.

10.12.7 How quickly should the form be completed and to whom should it be sent?

- The form should be completed **within 24 hours of you being aware of the incident** taking place – the point of this procedure is to speed up communication.
- Forward your completed untoward incident form to your manager.

11. Associated Documents to this Procedure

- [Accident and Incident Procedure](#)
- [Serious Untoward Incident Procedure](#)
- [Risk Assessment Procedure](#)
- [EVOLVE Sign In - London Borough of Haringey](#) (external link)
- Safeguarding Children
- [Haringey Safeguarding Children Partnership](#) (external link)

12. Further Guidance

12.1 The following documents have been used as references:

- Educational Visit DfE Guidance.
- Outdoor Education Advisers' Panel (OEAP).
- The Council for Learning Outside the Classroom (LOtC).
- Health & Safety Executive website.
- HSE School Trips and Outdoor Learning Activities.

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- Adventurous Activities Licensing Authority (AALA)
- Duke of Edinburgh
- Foreign and Commonwealth Office (FCO).

13. Monitoring and Review

13.1 A variety of monitoring systems must be utilised to ensure adherence with this procedure including departmental monitoring checks.

13.2 This safety procedure must be reviewed by the Corporate Health and Safety Team every 24 months and revised as soon as practicable where changes in statute or industry best practice deem the content out of date.

14. Approval of the Procedure

14.1 This safety procedure was reviewed and approved by the Council's Head of Resilience, Facilities and Safety on 19th August 2025. Any required variations from this safety procedure should be brought to the attention of the Council's Head of Organisational Resilience.

Approved by (print name): Andrew Meek

Signature: 

Date: 19th August 2025

14.2 This safety procedure was reviewed and approved by the Corporate Health, Safety and Wellbeing Board on 27th August 2025.

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15. Glossary

Acronym	Full Abbreviation
CYPS	Children & Young People's Services
DofE	Department of Education
OEAP	Outdoor Education Advisers Panel
LA	Corporate Health and Safety Team
EVC	Educational Visits Coordinator
SLA	Service Level Agreement
HSE	Health & Safety Executive
EVOLVE	Online Trip Management System
DBS	Disclosure Barring Service
LOtC	Council for Learning Outside the Classroom
AALA	Adventurous Activities Licensing Authority
DOFE	Duke of Edinburgh's Award
FCO	Foreign and Commonwealth Office

16. Document Control

Version No	Review date	Amendments made:	Undertaken by:
4	2025-08-01	<ul style="list-style-type: none">Review of old procedure.New format to include contents table, document control, glossary.Clearer information on what is required from schools.CYPS service activities and use of EVOLVE clarified.Documents made accessible and additional forms and guidance added.	Sarah Darlington Senior H&S Advisor (People)
3	2021-04-01	<ul style="list-style-type: none">Procedure reviewed.	Health and Safety Team
2	2019-11-01	<ul style="list-style-type: none">Procedure reviewed and put into new format.Approval information added.	Health and Safety Team
1	Unknown	First published	Health and Safety Team

END OF PROCEDURE AND GUIDANCE