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Guidance
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Monitoring

It is a statutory requirement for an employer to monitor the implementation of their health and safety arrangements. Employers may delegate responsibilities for monitoring to their establishments, but must monitor whether the establishments implement these responsibilities.

In addition to health and safety, monitoring should include other critical areas such as safeguarding, quality of provision and the performance of external providers.

Monitoring should be done in such a way that it is a positive experience for leaders, with constructive feedback to enable them to reflect upon and improve their practice. It can be integrated with appraisal, and, in schools, with observation of teaching and learning – in this case outside the classroom.

See also National Guidance documents [4.2c "Reviewing"](#) and [5.1d "Evaluation"](#).

Field Observation

Monitoring of off-site visits and activities should include an element of field observation.

Decisions about the focus and extent of field observation should be informed by risk assessment. There are many ways of targeting or sampling the range of provision, for example:

- Observe a representative sample from the full range of provision;
- Focus on frequent or routine activities;
- Focus on activity that is more complex and requiring enhanced planning and management;
- Focus on areas where leaders or the establishment are less experienced.

Monitoring by the Employer

Employer monitoring of outdoor learning and off-site visits should ensure that:

- Visits and activities are carried out safely and effectively and in line with the employer's policy and procedures;
- Relevant policies and procedures are reviewed and updated to remain current and in line with good practice;
- Employees have easy access to the employer's policies and to National Guidance;

- Employees have access to relevant training that supports the implementation of this guidance, e.g. Educational Visit Coordinator (EVC) training, Visit Leader training;
- Establishments have access to advice and further information to clarify the guidance issued;
- Establishments appoint, train and revalidate EVCs in accordance with the employer's policies;
- Establishment practices, including notification and approval procedures, comply with the employer's policies;
- Establishments keep appropriate records.

Monitoring by the Establishment

Where an employer chooses to delegate some monitoring to establishments, the employer should clearly communicate their expectations.

Each establishment should set out their approach to monitoring in their policy document. It should address the following issues:

- The monitoring role of the EVC, Head/Manager, other senior staff and the governing body;
- Requirements for reporting of accidents, near misses, incidents and concerns;
- Requirements for other reporting (for example, a requirement for visit leaders to submit a completed review form after all visits that meet certain criteria);
- Notification and approval procedures;
- The types of visits subject to scrutiny by the EVC or Head/Manager;
- Any arrangements for peer monitoring on a sample basis;
- The focus and extent of monitoring through field ('out-of-classroom') observation.

