



National  
Guidance

## Model form: Establishment Self-Evaluation

**Establishment** \_\_\_\_\_

**Head/Manager** \_\_\_\_\_

**EVC(s)** \_\_\_\_\_

The EVC(s) and Head/Manager of the establishment should complete this form together. Score each requirement on a scale of 1 to 5, where 1 is poor and 5 is excellent. Add brief comments as appropriate.

Requirement	Score	Comments
There is an establishment Visit Policy covering all outdoor learning, off site visits and LOtC.		
The EVC maintains records of all visits and relevant LOtC activities.		
The policy statement identifies the roles and responsibilities of Governors (or equivalent) the Head Teacher/Manager, the EVC, Group Leaders, Assistant Leaders and Voluntary Assistants.		
Appropriate Risk-Benefit Assessments are carried out for all LOtC, visits and off-site activities.		

Procedures are in place to ensure there is formal and specific approval for all visits.		
Procedures are in place to ensure there is sample monitoring by the establishment across the range of visits undertaken.		
Guidance is readily available to all staff.		
All staff involved in visits receive specific training to ensure appropriate understanding of the guidance.		
All accidents and incidents occurring on visits are reported and recorded.		
Accidents and incidents are reviewed to inform future Risk-Benefit Assessments.		
Induction and staff development procedures for visits are in place.		
Staff have access to EVC update information and EVC advice when planning visits.		
Parental Information requirements are met and consent procedures are in place where required.		
Nominated Emergency Contact(s) are available at all times and have ready access to all records and planning details of the visits they cover.		
All staff/helpers involved in off-site visits/activities are competent in relation to their allotted tasks.		

All activities undertaken during visits are carried out to standards of current good practice.		
A record is held of any formal assessments and qualifications have been checked.		
The use of external providers complies with employer recommendations and requirements.		
Emergency procedures are in place to cover the range of visits undertaken and times at which they take place.		
Insurance requirements are understood by all visit organisers.		
Adequate personal and protective equipment is available to staff and pupils participating in off-site visits.		
Specialist equipment is fit for purpose, maintained, regularly inspected and inspection results recorded.		
There are suitable Child Protection measures for vetting all people involved with outdoor learning, off site visits and LOtC.		
Transport arrangements meet regulatory and employer requirements.		
Policy and practice is monitored and reviewed appropriately		
Emergency procedures are periodically tested via realistic scenarios and table-top exercises. This involves testing any links to Local Authority procedures		

If the completion of this form has identified the need for any specific actions, note them here.

Action required	Person responsible for the action	To be completed by (date)

If the completion of this form has identified any training needs, note them here.

Training need identified	People in need of training	Training to be completed by (date)

The EVC should retain one copy of this form as part of the establishment records for monitoring purposes.

Governors should be given a copy of the form to enable them to fulfil their health and safety responsibilities.

Date of next self-evaluation \_\_\_\_\_

**Completed by** \_\_\_\_\_

Position \_\_\_\_\_ **Date** \_\_\_\_\_

