



Lone Working Policy

Version: 2.0

Policy Owner: Andy Robinson, Director

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1. Purpose

Insight2Excellence Ltd recognises that coaching is often delivered without another colleague being physically present.

Lone working can present additional risks to both the coach and, in some circumstances, the client. This policy sets out the arrangements in place to identify and reduce those risks while enabling coaching to be delivered safely, professionally, respectfully and effectively.

The purpose of this policy is to:

- promote the safety and wellbeing of the coach and clients;
- identify and reduce foreseeable risks associated with lone working;
- support proportionate professional risk assessment and decision-making;
- ensure appropriate planning before lone working takes place;
- provide clear arrangements for responding to emergencies, incidents and changing circumstances;
- support safe and accessible coaching arrangements; and
- ensure that learning from incidents and near misses informs future practice.

Personal safety takes priority over the delivery of any individual coaching session.

2. Scope

This policy applies whenever coaching or coaching-related work is undertaken without another colleague being present, including:

- coaching in clients' homes;
- coaching in the coach's own home or other home-working environment;
- hired coaching, counselling or meeting rooms;
- community venues;
- workplaces and other third-party premises;
- online coaching;
- telephone coaching;
- travel undertaken in connection with coaching; and
- other situations in which the coach is working without close or direct supervision.

As Insight2Excellence currently operates as a sole-practitioner service, the Director is responsible for implementing this policy and for exercising professional judgement about whether particular arrangements are safe and appropriate.

3. Principles

Insight2Excellence operates on the following principles:

- personal safety is paramount;
 - no coaching session is more important than personal safety;
 - risks should be considered before lone working takes place and reviewed when circumstances change;
 - risks should be reduced so far as reasonably practicable;
 - coaching should only proceed where the remaining level of risk is acceptable;
 - the coach may pause, end or rearrange a session if circumstances become unsafe;
 - clients should be treated with dignity and respect when safety arrangements affect the delivery of coaching;
 - reasonable adjustments should be considered where required, provided that safe working arrangements can still be maintained; and
 - professional judgement should be trusted where circumstances cannot be adequately anticipated in advance.
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4. Risk Assessment

A proportionate risk assessment will be undertaken before working in a new or unfamiliar environment and whenever there is a material change in circumstances.

Consideration may include:

- the location and accessibility of the venue;
- whether the environment is private and suitable for coaching;
- isolation and ease of access to assistance;
- parking and safe arrival/departure;
- lighting;
- mobile phone coverage;
- emergency exits and escape routes;
- the presence of other people;
- known or reported risks associated with the location or circumstances;
- previous incidents or concerns;
- the client's circumstances where relevant to safety;
- time of day;
- travel arrangements;
- weather conditions where relevant;
- risks associated with animals or other environmental hazards;
- risks of aggression, violence or intimidation;
- alcohol or drug use;
- any information indicating that additional precautions may be necessary; and
- whether the proposed arrangement remains appropriate for the coach and client.

Where risks cannot be adequately controlled, Insight2Excellence may:

- use an alternative venue;
- move the session online;
- change the time or arrangements;
- require another appropriate person to be present;
- postpone the session; or
- decline to provide coaching in the proposed setting.

Risk assessment will be proportionate to the circumstances. Not every coaching session requires a formal written assessment.

5. Home Visits

Home visits may be undertaken where they are considered appropriate and safe following consideration of the circumstances.

Before a home visit, the coach will:

- agree the appointment in advance;
- know the address before travelling;
- consider how safely the property can be approached and left;
- consider available parking and lighting;
- carry a charged mobile phone;
- be aware of exits and maintain a clear route to leave;
- avoid entering areas of the property that are unnecessary for the coaching session;
- consider whether other people, animals or environmental hazards may affect safety; and
- consider any information already known that may indicate an increased risk.

Where appropriate, relevant information about known safety concerns may be sought before the visit.

The coach may decline or rearrange a home visit where the environment or circumstances cannot be made sufficiently safe.

During the visit, the coach will remain alert to changes in:

- behaviour;
- mood or circumstances;
- the physical environment;
- the presence of unexpected people;
- alcohol or drug use;
- aggression or threatening behaviour;
- the presence of weapons;
- animals or other hazards; or
- any other factor that materially changes the safety assessment.

If safety becomes compromised, the coach will leave or end the session as soon as it is safe to do so.

The coach will never remain in a situation where personal safety is at unacceptable risk.

6. Dynamic Risk Assessment

Risk assessment is an ongoing process.

The coach will use professional judgement throughout a session and will respond to changes in circumstances.

Factors that may require the session to be paused, ended or rearranged include:

- aggression, intimidation or threats;
- significant deterioration in the environment or circumstances;
- unexpected visitors;
- alcohol or drug use where this affects safety or the suitability of coaching;
- the presence of weapons;
- unsafe animals;
- physical hazards;
- concerns about the coach's own wellbeing or ability to continue safely;
- a significant change in the client's presentation that falls outside the safe scope of coaching; or
- any other circumstance that causes the coach to believe that continuing is unsafe or inappropriate.

The coach does not need to justify remaining in an unsafe situation.

7. Work-Related Violence and Aggression

Insight2Excellence recognises that lone workers may be more vulnerable when faced with violence, aggression or threatening behaviour because immediate support may not be available.

Work-related violence includes physical violence, threats, intimidation and serious verbal abuse.

The coach will seek to reduce the likelihood of escalation through appropriate professional communication, clear boundaries and calm de-escalation where this is safe and appropriate.

The coach will not attempt to manage or de-escalate a situation where doing so would create unacceptable personal risk.

If a situation becomes unsafe, the priority will be to create distance, leave the environment where possible and contact emergency services where necessary.

Any significant incident or threat will be recorded and reviewed in accordance with this policy and other relevant policies.

8. Personal Safety

The coach will take reasonable precautions when working alone, including:

- carrying a charged mobile phone;
- maintaining awareness of surroundings;

- avoiding unnecessary valuables;
- maintaining a clear route to an exit where practicable;
- ensuring that appointments and locations are appropriately planned;
- trusting professional judgement and instincts;
- taking reasonable breaks and avoiding working when fatigue materially affects safe decision-making; and
- leaving immediately where remaining would create unacceptable risk.

No explanation or apology is required for ending or leaving a session where this is necessary to maintain safety.

9. Communication and Check-In Arrangements

Because Insight2Excellence operates as a sole-practitioner service, additional communication arrangements may be used where the level of risk warrants them.

For higher-risk or unfamiliar physical appointments, the coach may arrange for a trusted person to know:

- the general location of the appointment;
- the expected start and finish time; and
- when contact should be expected.

Where a check-in arrangement is used, the minimum information necessary will be shared.

If a planned check-in is missed and the coach cannot be contacted, the agreed escalation arrangements may be activated.

Routine tracking or disclosure of client information is not required unless there is a specific safety reason for doing so.

10. Travel

Reasonable travel planning will take place before travelling in connection with coaching.

Consideration may include:

- weather conditions;
- journey time;
- route;
- parking;
- lighting;
- expected arrival and departure times;

- vehicle condition and safety;
- fuel or charging requirements;
- mobile phone availability; and
- whether the journey can be completed safely.

The coach will not continue a journey where conditions have become unsafe.

Where necessary, an appointment may be postponed, rearranged or moved online.

11. Online and Telephone Coaching

Online and telephone coaching also involve lone working and require appropriate consideration of safety.

The coach will:

- work from an environment that is reasonably private and suitable for coaching;
- use appropriate and secure technology;
- maintain appropriate professional boundaries;
- ensure that relevant emergency information is available where reasonably necessary;
- consider whether the client's location is known sufficiently to enable an appropriate emergency response where a foreseeable risk makes this necessary; and
- respond to serious safety or safeguarding concerns in accordance with the relevant policies.

Where a client appears to be at immediate risk of serious harm and emergency intervention is required, the coach may need to contact emergency services or another appropriate service.

Where it is reasonably possible and safe to do so, the coach will explain this limitation to the client.

Information obtained for emergency or safeguarding purposes will be handled in accordance with the Confidentiality & Privacy Policy and Data Protection Policy.

12. Client Safety and Scope of Coaching

Lone working arrangements must also consider the safety and wellbeing of clients.

Coaching will remain within the coach's professional competence and agreed scope of practice.

Where circumstances indicate that coaching is no longer an appropriate or sufficiently safe intervention, the coach may pause or end the session and consider whether referral to an appropriate professional or emergency service is required.

Safeguarding concerns will be managed in accordance with the Safeguarding Adults Policy.

Nothing in this policy prevents emergency action where necessary to protect life or prevent serious harm.

13. Emergencies

If there is immediate danger to the coach or another person, the priority is protection of life and safety.

Depending on the circumstances, the coach may:

- leave the situation immediately where safe to do so;
- contact the emergency services;
- seek medical assistance;
- contact an appropriate emergency or safeguarding service;
- activate an agreed check-in or escalation arrangement; and/or
- take other reasonable steps necessary to protect life or prevent serious harm.

Safeguarding concerns will be managed in accordance with the Safeguarding Adults Policy.

Where emergency action requires information to be shared without prior consent, this will be handled in accordance with the Confidentiality & Privacy Policy and Data Protection Policy.

14. Professional Boundaries

Lone working must never compromise professional boundaries.

The coach will:

- maintain appropriate professional behaviour;
- avoid circumstances that could reasonably be misinterpreted;
- maintain transparency in professional relationships;
- respect the client's privacy and dignity;
- maintain appropriate physical and communication boundaries; and
- follow the Professional Boundaries Policy.

Safety considerations do not remove the requirement to practise ethically and professionally.

15. Recording Incidents and Near Misses

Significant safety concerns, incidents and near misses arising from lone working will be recorded as soon as reasonably practicable.

Records should be factual, proportionate and limited to information that is relevant to the incident.

Where appropriate, records may include:

- date and time;
- location or setting;
- circumstances;
- nature of the concern or incident;
- people involved;
- action taken;
- whether emergency or safeguarding services were contacted;
- any follow-up required; and
- learning or changes to future arrangements.

Records will be handled in accordance with the Data Protection Policy and Confidentiality & Privacy Policy.

16. Post-Incident Support and Learning

Following a significant incident or near miss, consideration will be given to:

- what happened;
- whether anyone was harmed or placed at risk;
- what worked well;
- whether additional support is required;
- whether the risk assessment remains appropriate;
- whether working arrangements should change;
- whether any safeguarding or insurance notification is required; and
- whether any policy, procedure, training or professional practice should be amended.

Insight2Excellence is committed to learning from experience rather than treating incidents solely as individual events.

17. Accessibility and Reasonable Adjustments

Insight2Excellence aims to provide accessible coaching arrangements and will consider reasonable adjustments for disabled clients.

Adjustments may include changes to:

- venue;
- timing;

- communication method;
- online or in-person delivery;
- physical arrangements; or
- other aspects of the coaching process.

Any adjustment will be considered alongside the requirement to maintain safe working arrangements.

A request for a reasonable adjustment will not automatically be treated as a safety concern. Safety will be assessed on the actual circumstances rather than assumptions about disability or other personal characteristics.

18. Relationship with Other Policies

This policy should be read alongside:

- Safeguarding Adults Policy;
- Professional Boundaries Policy;
- Confidentiality & Privacy Policy;
- Data Protection Policy;
- Complaints Procedure;
- Risk Assessment arrangements;
- Home Visits Guidance, where applicable; and
- Coaching Agreement / Terms of Coaching.

Where policies overlap, they should be applied together and interpreted consistently.

19. Legal and Professional Framework

This policy is informed by relevant UK health and safety legislation and guidance, including:

- Health and Safety at Work etc. Act 1974;
- Management of Health and Safety at Work Regulations 1999, where applicable;
- relevant Health and Safety Executive guidance on lone working, risk assessment, violence and aggression, home working and emergency arrangements;
- Equality Act 2010 and relevant Equality and Human Rights Commission guidance concerning accessible services and reasonable adjustments;
- Association for Coaching Global Code of Ethics;
- Universal Coaching Alliance Code of Professional Conduct and Ethics; and
- relevant professional insurance and risk-management guidance.

This policy is intended to support proportionate risk management and does not replace professional judgement or any specific legal duty applicable to particular circumstances.

20. Review

This policy will be reviewed annually or sooner if:

- legislation or regulatory requirements change;
 - HSE or other relevant guidance changes;
 - professional standards develop;
 - the nature or location of the coaching service changes;
 - a significant incident or near miss identifies a need for improvement; or
 - other learning indicates that the policy should be amended.
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Appendix A – Lone Working Safety Checklist

Before a lone-working session, consider:

Location

- Do I know where I am going?
- Is the location appropriate and reasonably safe?
- Do I know how I can leave quickly if necessary?

Communication

- Is my phone charged and available?
- Do I know who to contact in an emergency?
- Does this appointment warrant a check-in arrangement?

Environment

- Are there any known risks?
- Are there other people, animals or environmental hazards that need consideration?
- Is the environment private and suitable for coaching?

Travel

- Can I travel there and back safely?
- Have I considered weather, parking, lighting and journey time?

Professional practice

- Is this coaching within my professional competence?

- Are professional boundaries clear?
- Are any safeguarding concerns present?

Online coaching

- Do I have sufficient information to respond appropriately if an emergency occurs?
- Is the technology and environment appropriate?

Dynamic assessment

- Have circumstances changed since the appointment was arranged?
- Is there anything happening now that changes the safety assessment?

Final question

Am I comfortable that it is safe and appropriate to proceed?

If the answer is no, stop and reconsider the arrangements.

No coaching session is more important than personal safety.