



Educational Visits Policy

Document Control

| Version | Author | Summary of Changes | Approved By | Date Published | Date of Review |
|---------|--------|--------------------|-------------|----------------|----------------|
| 1 | RGR | New policy | CEO | July 2025 | July 2027 |
| | | | | | |

Contents

| | |
|---|----|
| 1. AIMS AND SCOPE..... | 3 |
| 2. LEGISLATION AND GUIDANCE | 3 |
| 3. ROLES AND RESPONSIBILITIES..... | 3 |
| 4. PLANNING AND PREPARATION..... | 5 |
| 5. RISK ASSESSMENT..... | 6 |
| 6. VOLUNTEERS..... | 8 |
| 7. COMMUNICATION AND CONSENT..... | 9 |
| 8. EMERGENCY PROCEDURES AND INCIDENT REPORTING | 9 |
| 9. FINANCES, CHARGING AND INSURANCE..... | 11 |
| 10. RESIDENTIAL VISITS | 12 |
| 11. REVIEW..... | 13 |
| 12. LINKS WITH OTHER POLICIES..... | 13 |
| APPENDIX 1: PROPOSED VISIT PLANNING INFORMATION | 14 |
| APPENDIX 2: RISK ASSESSMENT TEMPLATE | 16 |
| APPENDIX 3: VOLUNTEER CODE OF CONDUCT | 17 |
| APPENDIX 4: EMERGENCY PLAN TEMPLATE..... | 18 |
| APPENDIX 5: POST EDUCATIONAL VISIT BOOKING CHECKLIST..... | 20 |
| APPENDIX 6: PRE-DEPARTURE CHECKLIST | 21 |
| APPENDIX 7: EDUCATIONAL VISIT EVALUATION FORM..... | 22 |
| APPENDIX 8: FINAL CHECKLIST | 24 |

1. AIMS AND SCOPE

Educational visits play a vital role in enriching the curriculum and providing pupils with meaningful social, cultural, and personal development opportunities. These experiences support the development of life skills, encourage independence, and help lay the foundation for lifelong learning. They are a key part of the Trust's commitment to delivering a broad, balanced, and engaging education.

Educational visits are defined as any activity organised by the school that takes place off the school premises and has been authorised by the Headteacher. This policy applies to all such activities, regardless of whether they take place during or outside normal school hours, including evenings, weekends, and holiday periods.

This includes, but is not limited to:

- Local visits (e.g. parks, community spaces)
- Day educational visits to museums, galleries, and cultural or educational sites
- Sports fixtures and tournaments
- Adventurous or outdoor activities
- Residential educational visits
- Overseas visits

This policy outlines the Trust's approach to planning and delivering educational visits, ensuring they are safe, inclusive, well-managed, and appropriately risk assessed. It sets out the roles and responsibilities of school staff, volunteers, and pupils, and aligns with the Trust's Risk Management Policy.

Residential and overseas visits are considered medium to high-risk activities, and therefore require enhanced planning, risk assessment, and formal approval in line with the Trust's protocols.

2. LEGISLATION AND GUIDANCE

This policy is based on the Department for Education's guidance on [health and safety on educational visits](#), and the following legislation and statutory guidance:

- [Equality Act 2010](#)
- [SEND Code of Practice](#)
- [Keeping children safe in education 2024](#)
- [statutory framework for the Early Years Foundation Stage](#) (for applicable schools).

Any breach of the expectations outlined in this policy or the Staff Code of Conduct may result in disciplinary investigation under the Trust's Staff Discipline Policy. This includes inappropriate conduct during off-site visits, failure to safeguard pupils, or acting in a manner that brings the Trust into disrepute (see Section 11 of the Code).

3. ROLES AND RESPONSIBILITIES

3.1 Headteacher

The Headteacher is responsible for:

- Approving staff requests for educational visits, including having final authority to approve any visit of less than 24 hours
- Working with the Academy Governing Body to approve residential or overseas visits exceeding 24 hours
- Ensuring that all staff involved in educational visits, including the EVC, have the necessary training and competence (appropriate knowledge, skills, training, and experience) to undertake their roles

- Seeking advice or escalating decisions where they feel they do not have the competence or confidence to approve an activity
- Not approving any educational visit unless all required elements (e.g. risk assessments, medical information, staffing) are in place
- Ensuring that a clear delegation and communication hierarchy is defined for each educational visit, particularly in the event of an emergency. This must be documented in the educational visit's emergency plan

3.2 Educational Visits Coordinator (EVC)

Each school must appoint an EVC, designated by the Headteacher, who will:

- Oversee and support staff in the planning and organisation of educational visits
- Assess the competence of proposed Educational Visit Leaders and other supervising staff
- Assess the suitability of external providers
- Advise the Headteacher and Academy Governing Body during the educational visit approval process
- Ensure appropriate training and ongoing support is accessed for all educational visit staff
- Evaluate completed visits to identify learning and inform future planning
- Seek advice or escalate concerns if they feel they lack the competence to fulfil any part of their role
- Not approve a visit unless all required elements are in place

3.3 Educational Visit Lead

Every educational visit must have a designated Educational Visit Lead who will:

- Plan the visit, ensuring that risks are identified and managed
- Cost out the visit both in whole and for parents
- Complete all required documentation (e.g. risk assessments, pre-booking forms, Exeant system entries)
- Seek educational visit approval from the Headteacher and EVC
- Assign and brief staff and volunteers, ensuring all are competent and confident in their roles
- Ensure all relevant information (including venue, activities, travel, and safeguarding needs) is known, assessed, and factored into the plan
- Ensure the needs of all pupils are considered, including those requiring additional support
- Provide parents with clear information about the visit, including costs and equipment required
- Communicate expectations and responsibilities to staff, pupils, and parents
- Ensure the educational visit is fully planned, including emergency procedures, and that risks are reduced as far as reasonably practicable
- Seek support where needed and not proceed unless all required elements are in place
- Be ultimately responsible for the pre-arrangements and decisions made on trip

3.4 Staff

All staff attending educational visits are responsible for ensuring the safety and wellbeing of pupils.

They must:

- Take reasonable care for their own safety and the safety of others
- Supervise and manage pupil behaviour in line with the Behaviour Policy
- Follow instructions from the Educational Visit Lead and communicate any concerns promptly
- Escalate unresolved concerns to the EVC or Headteacher
- Seek guidance if they are unsure of any responsibility given to them or feel unqualified to undertake a task
- Adhere to the Staff Code of Conduct, including expectations around professional boundaries, appropriate communication, and avoiding one-to-one situations in private
- Not consume alcohol at any time during residential or overseas educational visits; breaches may result in disciplinary action
- Be aware of the communication and decision-making hierarchy set out in the educational visit's emergency plan

3.5 Parents

By consenting to their child's participation in an educational visit, parents agree to:

- Provide accurate emergency contact and medical information
- Return consent forms and other required documentation promptly
- Inform the school of any concerns or circumstances that may affect their child's ability to participate safely

3.6 Volunteers

Volunteers attending educational visits must:

- Follow staff direction and model good behaviour
- Supervise pupils responsibly and report any concerns to staff
- Not consume alcohol during the educational visit
- Seek clarification if unsure of their role or feel unable to complete a task safely

3.7 Pupils

Pupils are expected to follow the school's behaviour policy throughout any educational visit. They must:

- Follow staff instructions and behave appropriately at all times
- Dress appropriately and show respect for people and places visited
- Take responsibility for their actions and report any concerns to a member of staff

4. PLANNING AND PREPARATION

4.1 Planning

The decision on whether a visit will proceed is made by the Headteacher, taking into account the following factors:

- Cost (including any potential cost to parents)
- Timing within the school year and any potential conflicts
- Educational value and purpose
- Likely disruption to normal school operations
- Health and safety risks and mitigation
- Staff-to-pupil ratios
- Inclusion and accessibility considerations
- Any other relevant or context-specific factors

As part of the planning stage, the Educational Visit Lead must gather key information to support the proposal, including:

- Destination and travel distance
- Transport options and arrangements
- A full cost breakdown (including alternative options where available)
- Staffing and volunteer requirements
- Equipment and supplies needed
- Accommodation arrangements, if applicable
- Insurance requirements
- Risk assessments and first aid planning
- Emergency procedures
- Measures to reduce any identified risks

4.2 Educational Visit Approval Process

The approval process is as follows:

1. The Pre-Visit Approval Form (Appendix 1) must be completed, with all supporting documents, and submitted to the Headteacher before any booking is made.
2. For residential or overseas visits, the Academy Governing Body must also approve the visit before booking.

3. Once a visit is approved, the Post-Approval Planning Checklist (Appendix 5) must be followed to plan, book, and communicate arrangements to parents and pupils.
4. Between 1 week and 1 day prior to departure (depending on the nature of the visit), the Pre-Departure Checklist (Appendix 6) must be completed and added to the visit file.
5. After the visit, an Evaluation Form (Appendix 7) must be completed to capture learning and inform future planning.

If the Educational Visit Leader is the Headteacher, the visit must be approved by the Academy Governing Body.

4.3 Staff Briefing

All staff attending educational visits must attend a compulsory briefing that includes:

- Safeguarding responsibilities and procedures
- Alcohol and staff conduct expectations
- Emergency planning and escalation protocols
- First aid, medical needs, and known pupil vulnerabilities
- Roles and responsibilities of all attending staff
- Any agreed adjustments or risk mitigations
- A reminder of the Trust's Staff Code of Conduct

Attendance must be recorded, and any ambiguity around expectations (e.g. alcohol, free time, communication protocols) must be clarified and documented.

5. Inclusion and Participation

5.1 Equal Access

All pupils, regardless of background or ability, should be able to take part in all aspects of school life, including educational visits. No pupil should be unfairly excluded due to financial, behavioural, medical, or special educational needs.

5.2 SEND and Medical Needs

If a pupil with an Education, Health and Care (EHC) Plan, a disability, or a specific medical condition (e.g. allergies, diabetes) is attending, the following will apply:

- They will receive the same support they are entitled to during the school day
- Reasonable adjustments will be made to the itinerary and supervision
- Additional support staff may be assigned as needed
- A tailored risk assessment will be completed and kept on file

5.3 Challenging Behaviour

In rare cases, it may be reasonable to exclude a pupil from a visit if there is a clear risk to their own safety or the safety of others. Before making this decision, the school will:

- Consider reasonable adaptations to support participation
- Explore whether increased staffing (e.g. 1:1 supervision) would be sufficient
- Work with parents to explore risk reduction strategies
- Keep a record of the rationale and the decision-making process

5. RISK ASSESSMENT

5.1 Risk Assessments

The Educational Visit Leader must complete a risk assessment before a visit is approved by the EVC and Headteacher. This assessment will then be reviewed and updated once final details (e.g. confirmed bookings, pupil list, travel details) are in place.

Risk assessments must be completed using the template in Appendix 2 and submitted via the Exeant portal.

All risk assessments must be approved by the EVC and Headteacher, and a printed copy taken on the visit.

Risk assessments must address:

- Medical needs and allergies (for pupils and staff)
- Supervision arrangements and staff roles
- Transport risks (to and from the venue)
- Activities being undertaken
- Venue hazards (e.g. bodies of water, heights, animals)
- Dynamic risk management plans (what to do if circumstances change)
- Emergency procedures and escalation routes

The visit must not proceed unless all significant risks have been assessed and adequate control measures are in place. Any unresolved concerns must be escalated to the EVC and Headteacher, and if necessary, the visit cancelled or postponed.

5.1.2 Additional requirements for residential and overseas visits:

For residential or overseas visits, the risk assessment must include a detailed review of accommodation, including:

- Access to other rooms (e.g. shared corridors or rooms with other guests)
- Balconies, lifts, and open walkways
- Emergency exits and fire evacuation routes
- Location of staff sleeping areas in relation to pupils
- Supervision during free time
- Any known risks (e.g. climbable balconies) and mitigations (e.g. restricted access, increased supervision, locked rooms)

5.2 Staff Ratios and First Aid

Each risk assessment will identify the appropriate level of supervision required.

As a minimum:

- Residential visits for mixed-gender groups must include at least one male and one female adult
- At least one academy/Trust employee with a valid first aid qualification must be present on every visit. This person cannot be a third party (e.g. provider staff). Third-party first aiders may be included as part of the broader provision, but do not replace the required school-employed first aider
- For visits involving EYFS children, there must be at least one paediatric first aider present
- Residential or overseas visits must include a minimum of two first-aid trained adults

Minimum adult-to-pupil ratios (unless the risk assessment justifies otherwise):

| Age Group | Ratio (Minimum) |
|----------------------|------------------------|
| EYFS | 1 adult : 8 children |
| Primary (above EYFS) | 1 adult : 15 children |
| Secondary | 1 adult : 20 pupils |

Ratios must be adjusted based on group needs, environment, distance from school, staff experience, and activity type.

Other key supervision requirements:

- All supervising adults must be aware of medical needs, allergies, and emergency protocols
- Adults without an enhanced DBS must not be left alone with pupils under any circumstances and cannot be counted in ratios where lone working could occur
- Appropriate first aid supplies must be carried at all times, in line with the risk assessment and the Health And Safety Policy

5.3 Transport

Transport will be arranged by the school, following the Procurement Policy and the Health & Safety Policy. The Educational Visit Leader must ensure:

- All transport is suitable, roadworthy, and appropriate for the needs of the group
- Vehicles and drivers meet legal requirements for transporting children
- Sufficient supervision is in place throughout the journey
- First aid equipment is available during transport

Unless agreed in advance with parents, all transport must depart from and return to the school site.

5.4 External Organisations

Where an external organisation is involved in delivering part or all of an activity, the Educational Visit Leader must:

- Confirm the organisation's insurance and safety credentials (e.g. Public Liability Insurance)
- Check whether they hold a Learning Outside the Classroom (Lot) Quality Badge
- If they do not, conduct additional checks as recommended in the DfE's guidance on health and safety on educational visits
- Establish a written agreement confirming respective responsibilities (e.g. who leads supervision, safeguarding, behaviour management)
- Ensure the organisation is aware of relevant pupil medical needs and the school's emergency protocols

6. VOLUNTEERS

Where appropriate, parents may be invited to volunteer on educational visits to support staff in supervising pupils. Where the number of volunteers exceeds the number required, selections will be made fairly and transparently, taking into account:

- The needs of the pupils attending
- The nature and setting of the visit
- The skills, attitude, and prior conduct of volunteers, including any previous experience supporting visits

Parents selected to volunteer will be:

- Informed at least 2 weeks prior to the visit
- Asked to confirm their attendance in writing
- Required to agree to and sign the Volunteer Code of Conduct (Appendix 3)

All volunteers will receive a briefing and induction from staff prior to departure. This will include:

- Their responsibilities and expected conduct
- The process for reporting concerns or issues
- Emergency procedures and contact details
- The planned itinerary or timetable for the visit

Where appropriate (e.g. residential visits or those where a volunteer may be left briefly without a staff member present), volunteers will be required to undergo safeguarding checks, including an enhanced DBS check.

Under no circumstances will a volunteer who has not been subject to safeguarding checks be left alone with pupils or placed in a position of sole responsibility for any child.

7. COMMUNICATION AND CONSENT

Parents of pupils invited to participate in an educational visit will be contacted at least one month in advance of the proposed date. Initial communications will include:

- The date and destination of the visit
- Travel times, including departure and return
- The purpose of the visit and how it links to the curriculum
- The number of pupils expected to attend

Further details provided will include:

- Drop-off and collection times and locations
- Travel arrangements and modes of transport
- Staffing levels and relevant staff qualifications (where applicable)
- Clothing and equipment required, and whether this will be provided by the school
- Behaviour expectations, and the consequences of failing to meet them
- How parents and the school will communicate in the event of an emergency or significant change to arrangements

7.1 Consent

Where required, parents will be asked to provide written consent by signing and returning a consent form to school.

For curriculum-based visits that take place during the normal school day, written consent may not be required. However, the school will always:

- Inform parents in advance of the visit
- Provide all necessary details as outlined above
- Offer the opportunity for parents to withdraw their child from the visit if they wish

7.2 Medical and Contact Information

Parents will also be asked to confirm:

- Any relevant medical or health information (e.g. allergies, medication, physical or mental health needs)
- Dietary requirements
- Emergency contact details where they can be reached on the day of the visit

7.3 Overseas Visits

For overseas visits, parents will additionally be required to provide:

- A valid passport for the pupil
- EHIC or GHIC information (if available)
- Any required visa documentation (depending on destination)

8. EMERGENCY PROCEDURES AND INCIDENT REPORTING

Emergency planning refers to preparing for incidents that pose a serious and unexpected risk, including:

- Life-threatening injury or illness
- A pupil or staff member going missing
- A serious breach of safeguarding expectations
- Any incident requiring hospitalisation or external agency involvement

8.1 Emergency Plan and Responsibilities

Each educational visit must have a written emergency plan (see Appendix 4), which must:

- Be developed and fully understood by the Educational Visit Leader
- Be shared in advance with all staff and volunteers attending the visit
- Be accessible in both print and digital form during the visit

- Be approved by the EVC

The emergency plan must include:

- Step-by-step guidance for managing medical emergencies, injuries, and hospitalisation
- Emergency contact escalation points: school, Trust, parents, insurer, embassy (where applicable)
- Details of local medical services (e.g. hospitals, emergency numbers)
- Guidance on using insurance for medical costs
- Child retrieval and return plans in the event of serious behavioural breaches

8.2 Managing an Emergency

In the event of an emergency:

- The visit leader or delegated supervising adult must contact the designated emergency contact as listed in the emergency plan
- This contact must always be available and must hold:
 - Full trip details
 - Participant names and contact information
 - Emergency contact details for all pupils and staff

At least one member of staff must accompany any pupil receiving medical treatment.

8.3 Missing Pupil Procedure

If a pupil is unaccounted for:

1. The visit leader will coordinate a search of the immediate area
2. A second adult must remain in charge of the other pupils
3. If the pupil is not found within 30 minutes, the emergency contact must be notified
4. Parents will be informed
5. The police will be contacted and given all necessary information to support the search
6. The visit leader will stay with police officers until the pupil is found, offering support and comfort
7. Remaining staff and pupils will return to school under supervision

8.4 Reporting and Post-Incident Actions

All accidents, incidents, and near-misses must be reported in accordance with the Trust's:

- Health and Safety Policy
- Accident/incident reporting and investigation procedures
- Requirements for reporting to Ofsted and the Health and Safety Executive (HSE)

All reports must be logged in Meditracker.

For minor incidents or near-misses not requiring external reporting, an internal report must still be completed. This should include recommendations to prevent future recurrence.

8.5 Visit Evaluation and Learning

Following every visit, the trip leader will complete an evaluation covering:

- The effectiveness of planning and risk management
- The suitability of venue and activities
- Any incidents, accidents or safeguarding concerns
- Lessons learned to inform future visits

8.6 Low-Level Concerns and Safeguarding

Where a low-level concern arises during a visit (e.g. unprofessional conduct, minor safeguarding concerns):

- The visit leader must report it to the Headteacher or Designated Safeguarding Lead (DSL) upon return
- Reports must follow the procedure outlined in the Staff Code of Conduct (Section 4.2)
- If the concern meets the harm threshold, it must be reported to the DSL immediately during the visit

9. FINANCES, CHARGING AND INSURANCE

9.1 Educational Visit Costing

- The Educational Visit Leader must use the [Educational Visit Calculator.xlsx](#) available on LETNet to complete the financial plan for the trip.
- Costings must be reviewed and approved by a member of the finance team before being submitted to the Headteacher as part of the pre-visit approval process.

9.2 Local Payments and Finance Support

- Educational Visit Leaders should avoid the use of cash payments, unless absolutely necessary and approved in advance by the finance team.
- The Trust finance team can support with:
 - Pre-purchasing tickets or services
 - Using the Trust's preloaded travel card for in-country payments (including local currency)
- For all financial planning (domestic or international), speak to the finance team early to explore available options and ensure compliance with Trust procedures.

9.3 Charging Parents

Parents will not be charged for:

- Educational visits taking place during normal school hours
- Visits outside of school hours that are part of:
 - The National Curriculum
 - A prescribed public examination syllabus
 - Religious education

In other cases, voluntary contributions may be requested to help cover costs. These are entirely optional and will not affect a pupil's right to attend, except for residential visits, where a charge may be necessary.

9.4 Insurance Requirements

Adequate insurance must be in place for all educational visits, covering:

- Cancellation (including supplier insolvency)
- Travel delays
- Medical emergencies
- Accidental injury
- Loss or theft of luggage or personal items

RPA insurance only covers:

- Pupils currently on roll (or those on roll at the time of the booking)
- Staff and volunteers

Details of the RPA can be found [Risk protection arrangement \(RPA\) for schools - GOV.UK](#) and contact details for further information can be found here.

The Educational Visit Leader must:

- Obtain a copy of the insurance policy
- Confirm that it offers appropriate cover for the activities involved

- Ensure a copy is taken on the visit in case it is required during an emergency

9.5 Emergency Contingency Funds

- All overseas and residential visits must include a preloaded emergency fund using a Trust-issued travel card
- Recommended minimum: £500 to £1000, depending on the size and duration of the visit
- An emergency 'on-call' UK based cardholder should be organised before the visit to support with any emergency funds
- Staff must never be expected to use personal funds or credit cards for emergency or unplanned purchases
- Any exceptions must be formally approved in writing by the Headteacher and Finance Director

9.6 Cash and Surplus Funds

Cash should be avoided where possible but where this is deemed necessary it must:

- Not exceed the pre-approved contingency limit
- Be stored securely at all times
- Be fully documented, including a log of all spending and balances
- Be supported by receipts for every transaction

Surplus funds (e.g. unspent voluntary contributions) must be clearly accounted for and not redistributed to pupils without prior approval from the Trust finance team.

10. RESIDENTIAL VISITS

The Headteacher, together with the Academy Governing Body, must approve all residential educational visits lasting longer than 24 hours.

All requirements set out in this policy apply equally to residential visits and single-day visits. In addition, the Educational Visit Leader must ensure:

- Staff involved in the visit have received all required training
- All relevant medical forms, permissions, and emergency contacts are obtained at least six weeks prior to departure
- All adults attending the visit, including volunteers, have undergone appropriate safeguarding checks. Where any adult will be in unsupervised contact with pupils, an enhanced DBS check must be completed

10.1 Parent Communication and Consent

Parents will be provided with full information about the visit no later than six weeks before departure. Final booking confirmation must not be made until parental consent has been secured. Information to be shared with parents will include:

- Departure and return dates and times
- Full address and contact details of the accommodation
- Planned activities and itinerary (including optional components)
- Meal provision arrangements
- Total cost of the visit, optional charges, and deadlines for deposits and full payment
 - This will include reference to the Trust's Charging and Remissions Policy, including any applicable exemptions
- Clothing and equipment requirements, including what is provided by the school and what pupils must bring
- Public health requirements (e.g. vaccinations, travel restrictions)
- Accommodation arrangements, including room sharing (if applicable)
- The names of all staff accompanying the group

10.2 Overseas Visits and External Providers

For visits abroad, the Educational Visit Leader must:

- Ensure any external provider holds an appropriate quality mark such as the Learning Outside the Classroom (LOtC) Quality Badge, or equivalent local accreditation
- Follow Foreign, Commonwealth and Development Office (FCDO) guidance on overseas travel
- Monitor and act on any travel warnings or restrictions issued prior to departure

10.3 Mixed or Composite Group Visits

Where the visit involves pupils from multiple schools (e.g. Trust-wide or multi-school visits), clear arrangements must be documented in advance, including:

- Who holds pastoral and safeguarding responsibility for each pupil group
- Which staff are responsible for which pupils
- Supervision arrangements
- Confirmation that all adults supervising pupils hold valid DBS checks

These arrangements must be agreed in writing and approved by all participating schools.

10.4 Post-Visit Evaluation

A formal debrief must be completed within 10 school days of returning from a residential or overseas visit. This should include:

- A written report from the Educational Visit Leader
- Staff reflections, including what went well and what could be improved
- Records of any medical incidents, accidents, or safeguarding concerns
- Financial reconciliation and reporting
- A judgment on the overall success of the visit and any lessons learned for future planning

11. REVIEW

This policy will be reviewed every 2 years by Leger Education Trust. At every review, the policy will be shared with by each school with their Academy Governing Body.

12. LINKS WITH OTHER POLICIES

This policy must be read in conjunction with the Trust's Staff Code of Conduct. Staff have a professional duty to uphold its principles during all school activities, including educational visits and residential. The Code outlines obligations around safeguarding, conduct, social media, and relationships that remain in force at all times.

This policy also links with the following policies and procedures:

- Health And Safety Policy
- Charging And Remissions Policy
- Behaviour Policy
- Child Protection & Safeguarding Policy
- First Aid Policy
- Supporting Pupils With Medical Conditions Policy
- Special Educational Needs (SEND) Policy
- Equality Information and Objectives
- Accessibility Plan
- Risk Management Policy

APPENDIX 1: PROPOSED VISIT PLANNING INFORMATION

To be completed by the staff member proposing the educational visit, and submitted to the Headteacher for approval before the educational visit is booked. This form must be completed a minimum of 6 weeks before the proposed educational visit date. The educational visit can only be booked once the **Headteacher has approved this form and all information must be present before approval.**

| | Educational Visit Information | Additional Comments |
|--|--------------------------------------|----------------------------|
| Name of person making the request | | |
| Date of request | | |
| Destination | | |
| Proposed educational visit dates | | |
| Proposed length of stay | | |
| Purpose of visit / educational benefits | | |
| Activities to be undertaken – please list them all | | |
| Number and age of pupils | | |
| Proposed transportation method – if multiple please state this. | | |
| Who will be the Educational Visit Leader and what experience/training do they have for leading the educational visit? | | |
| Number of Staff required | | |
| Number of first aiders required | | |
| What first aid provision has been considered? First aid supplies etc | | |
| State the proposed emergency planning arrangements (who will be the emergency contacts, including out of hours if the educational visit is a residential) | | |
| Cost breakdown using educational visit calculator, including multiple options where available | | |

| | Educational Visit Information | Additional Comments |
|---|--------------------------------------|----------------------------|
| In an emergency that requires payment how would this be funded/managed? | | |
| How are educational visits which have locally payable costs going to be managed? | | |
| Confirm that no cash is required for the educational visit | | |
| Accommodation options, where needed | | |
| Have you checked the RPA travel insurance document and does this provide suitable cover for your educational visit? | | |
| Please include the Initial risk assessment for the educational visit | | |
| Will all pupils attending the educational visit be on role when the educational visit takes place? | | |
| Are there any potential pupils with medical conditions? If yes what resource/provision is required (Extra staff, training etc). Please also consider any cost implications to meet this need | | |

Headteachers Decision:

| | |
|--|--------|
| Educational Visit Approved: | Yes/No |
| Comments on the information submitted: | |

Name:..... **Signature**.....

Date:.....

APPENDIX 2: RISK ASSESSMENT TEMPLATE

Date of Assessment:

Date(s) of Educational Visit:

Educational Visit Leader:

Assessor:

Educational Visit Destination:

Checked & Signed by (EVC & Headteacher):

| Hazard | Who might be harmed and how? | What are you already doing? | Do you need to do anything else to control this risk? | Action: Who? | Action: When? | Done |
|--|------------------------------|---|--|--------------------------|-------------------------------|------|
| E.g. slips and falls caused by wet floor | Pupils and staff | Appropriate footwear to be worn, first aid kit to be carried at all times | Follow additional instructions from destination staff as appropriate | Educational Visit Leader | Duration of educational visit | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

APPENDIX 3: VOLUNTEER CODE OF CONDUCT

This code of conduct sets out the expected behaviour for volunteers attending school educational visits. Volunteers should read and sign this form, showing that they understand and agree to follow this code while acting on behalf of the school. If you feel you cannot agree with this code, please speak to the Educational Visit Leader at the earliest opportunity and withdraw from the educational visit.

A copy of this form will be kept in the school office, and you may ask for a photocopy to keep for yourself.

This Volunteer Code Of Conduct will be used alongside the Parental Code Of Conduct and the Staff Code of Conduct, all of which can be found on LETNet and will be shared with all volunteers at the time of application.

Volunteers agree to:

- Remain professional and respectful with staff and pupils at all times
- Listen to and act on instructions from staff
- Dress appropriately for the educational visit
- Arrive at the agreed time and remain until the educational visit is concluded and they are told they may leave by staff
- Pay attention to potential dangers and raise concerns with staff
- Act responsibly and demonstrate good behaviour to pupils
- Volunteers must report **any concerns**, including low-level concerns, directly to the Educational Visit Leader or DSL—consistent with Trust Safeguarding and Whistleblowing Policies
- Their details being logged on the SCR before the visit and aligned with Safer Recruitment processes

Volunteers agree **not** to:

- Exchange contact details with pupils unless told to by a member of staff
- Engage in physical contact with pupils unless appropriate or required
- Share inappropriate personal information (i.e. personal beliefs, religious views, relationship status)
- Use demeaning, offensive, abusive or insensitive language
- Smoke, drink alcohol, or use drugs (other than those required for medical reasons) or be under the influence of alcohol or drugs (other than those required for medical reasons) for the duration of the visit
- Allow themselves to be left alone with a pupil unless previously agreed with staff
- Take photographs or record pupils without the permission of pupils and staff

As a volunteer, I have read and agree to this code of conduct and will follow the rules set out above.

Name:..... Signature.....

Date:.....

APPENDIX 4: EMERGENCY PLAN TEMPLATE

This emergency plan must be completed, printed, and shared with all staff attending the educational visit. A digital copy must also be accessible on a secure device during the visit.

1. Visit Overview

| | |
|---|--|
| School Name: | |
| Educational Visit Leader: | |
| Mobile Contact (Visit Leader): | |
| Deputy Leader Name & Contact: | |
| Destination: | |
| Departure Date/Time: | |
| Return Date/Time: | |
| Number of Pupils: | |
| Number of Staff/Volunteers: | |
| Accommodation Name & Address (if applicable): | |
| Accommodation Contact Number: | |

2. Emergency Contacts

| | |
|---|--|
| School-Based Emergency Contact (24/7): | |
| Name: | |
| Role: | |
| Phone (mobile): | |
| Backup Contact: | |
| Trust Emergency Contact: | |
| Name: | |
| Role: | |
| Phone (mobile): | |
| Trip Insurer (RPA/Other): | |
| Insurer: | |
| Policy Number: | |
| Emergency Number: | |
| Local Emergency Services (if overseas): | |
| Police: | |
| Medical: | |
| Embassy/Consulate: | |

3. Key Medical Information

| | |
|--|--|
| Known Medical Conditions / Allergies (staff and pupils): | |
| First Aid Trained Staff on Trip: | |
| Name(s) and qualification(s): | |
| Location of First Aid Kit(s): | |

4. Incident Response Flowchart

| | |
|-------------------------------|---|
| Medical Emergency | Provide first aid and contact emergency services. Inform school/trust. Record and update parents. |
| Missing Person | Search area, inform school and parents after 30 mins, contact police. Support search. |
| Safeguarding Concern | Remove pupil from risk, inform DSL, follow safeguarding protocol. |
| Behavioural Breach/Withdrawal | Inform parents, agree retrieval plan, document everything. |

5. Key Documents Checklist

| | With Leader? | Shared with Staff? | Digital Copy? |
|------------------------------------|--------------|--------------------|---------------|
| Pupil list with emergency contacts | | | |
| Medical summary sheet | | | |
| Risk assessments | | | |
| Insurance policy | | | |
| Itinerary and site map | | | |
| Roles & responsibilities list | | | |
| Staff & volunteer contact list | | | |

6. Communication Plan

| | |
|---|--|
| Daily check-in point (for residential/international trips): | |
| Method and time: | |
| How to contact parents/carers: | |
| Contingency communication method: | |

7. Evaluation Notes (Post-Trip)

| | |
|--|--|
| Were emergency protocols followed effectively? | |
| Lessons learned for future trips: | |
| Incidents requiring formal report/escalation: | |
| Signed (Visit Leader) & Date: | |
| Signed (EVC) & Date: | |

APPENDIX 5: POST EDUCATIONAL VISIT BOOKING CHECKLIST

To be completed by the Educational Visit Leader once the visit has been approved by the Headteacher and, where applicable, the Academy Governing Body.

| Task | Date Completed | By Whom | Notes/Links to Documentation |
|---|-----------------------|----------------|---|
| Confirm date, times, and destination details are booked and accurate | | | |
| Finalise staff and volunteer team and confirm availability | | | Include DBS check status and first aid cover |
| Check pupil numbers and compile attendance list | | | Attach to trip pack |
| Confirm all transport arrangements are booked and compliant | | | Transport provider insurance and licensing details on file |
| Confirm accommodation is booked and risk assessed (if applicable) | | | Attach provider RA or completed RA from visit leader |
| Ensure insurance documentation is obtained and suitable | | | Include RPA policy and any additional insurance for ex-pupils or complex needs |
| Request and collect parental consent forms | | | Digital and paper formats stored securely |
| Collect all required medical, dietary and emergency contact info | | | Stored securely with trip leader and designated backup contact |
| Arrange pre-visit site check or obtain virtual briefing from provider | | | Record observations or actions needed |
| Risk assessments uploaded to Exeant system | | | Final copy printed and shared with staff |
| Complete staff briefing (date/time set) | | | Agenda to include safeguarding, behaviour, emergency plan, roles, and first aid |
| Share behaviour expectations and itinerary with pupils | | | Behaviour agreement signed if required |
| Confirm briefing and code of conduct shared with all volunteers | | | Signed volunteer code of conduct stored in school office |
| Confirm emergency plan is complete and shared with staff | | | Appendix 4 template used and stored securely |
| Check mobile phone numbers and ensure communication methods work | | | Back-up power/batteries arranged if needed |
| Pack required first aid kit and medical supplies | | | In line with needs of pupils and staff on trip |
| Ensure Trust travel card or emergency funds are arranged | | | Contingency fund agreed and travel card loaded |
| Trip pack prepared for emergency contact in school | | | Must include contact numbers, itinerary, medical info, RAs, and plan |
| Notify catering if meal adjustments needed in school | | | Especially for FSM pupils staying behind |
| Notify site and attendance team of trip details | | | For safeguarding and fire register records |

Visit Leader Signature: _____

Date: _____

APPENDIX 6: PRE-DEPARTURE CHECKLIST

This checklist should be completed pre-departure between 1 week and 1 day before departure and be kept in the educational visit pack. To be completed by the Educational Visit Leader and signed off by the Headteacher or EVC prior to departure. A copy should be included in the visit pack and shared with the school's emergency contact.

| Checklist Item | Confirmed (Yes/No) | Comments / Notes |
|--|--------------------|------------------|
| Pupil list finalised and headcount confirmed | | |
| Medical and dietary needs reviewed and updates received | | |
| Emergency contacts confirmed and up to date | | |
| Emergency plan (Appendix 4) completed and reviewed | | |
| Staff and volunteers briefed (including safeguarding and first aid) | | |
| Volunteer Code of Conduct signed and on file | | |
| Staff Code of Conduct and alcohol expectations reinforced | | |
| Risk assessments reviewed and printed | | |
| First aid kits packed and checked | | |
| Medications labelled, signed out, and stored securely | | |
| Trip mobile phones charged and contact tested | | |
| Trust travel card or emergency funds checked | | |
| Transport confirmed with provider | | |
| Accommodation contacted to reconfirm details | | |
| Weather forecast checked and kit list updated if needed | | |
| Groupings and supervision arrangements finalised | | |
| Staff meeting held to review roles and contingency plan | | |
| Pupils reminded of expectations and behaviour agreement | | |
| Parents/carers reissued final itinerary and emergency contact details | | |
| Educational Visit folder compiled (including all required documentation) | | |

Visit Leader Name: _____

Signature: _____

Date: _____

Signed off by Headteacher / EVC: _____

Date: _____

APPENDIX 7: EDUCATIONAL VISIT EVALUATION FORM

To be completed by the Educational Visit Leader within 10 school days of the educational visit. This form should be submitted to the Headteacher and the EVC, and stored with the educational visit documentation.

| Section | Details / Reflection |
|---|-----------------------------|
| Visit Summary | |
| Name of Visit Leader | |
| Date(s) of Visit | |
| Destination | |
| Number of Pupils Attended | |
| Number of Staff/Volunteers | |
| Objectives | |
| Educational aims of the visit | |
| Were the objectives achieved? Please explain | |
| Behaviour and Conduct | |
| Were there any significant behaviour issues? | |
| How was pupil conduct overall? | |
| Were staff expectations and conduct upheld? | |
| Safeguarding, Medical & Wellbeing | |
| Any safeguarding concerns or disclosures? | |
| Any medical incidents or interventions? | |
| Was first aid provision adequate? | |
| Were pupil wellbeing and inclusion needs met? | |
| Logistics and Planning | |
| Did the itinerary run as planned? | |
| Were transport and accommodation suitable? | |
| Were the risk assessments appropriate and sufficient? | |
| Was the emergency plan followed or tested? | |
| External Providers | |
| Did external providers meet expectations? | |
| Were there any issues or incidents with providers? | |
| Finances | |
| Was the final budget within the approved amount? | |

| | |
|--|--|
| Were emergency funds used? If so, how and why? | |
| Are there any outstanding reimbursements or financial queries? | |
| Overall Reflection | |
| What worked particularly well? | |
| What could be improved? | |
| What changes would you recommend for future visits? | |

Signed (Visit Leader):

Date:

**Reviewed by
Headteacher/EVC:**

Date:

Educational Visit To-Do Checklist for Visit Leader

Pre-Planning Stage

- Identify purpose and educational benefits of visit
- Choose proposed destination and dates
- Determine travel method and accommodation (if applicable)
- Complete initial cost breakdown using Educational Visit Calculator
- Propose staff and volunteer team, including required first aiders
- Check insurance coverage via RPA policy
- Draft initial risk assessment
- Submit Pre-Visit Approval Form (Appendix 1) to Headteacher (≥ 6 weeks prior)
- Seek Governing Body approval (for visits > 24 hrs or overseas)

Post-Approval Planning

- Confirm transport and accommodation bookings
- Finalise staffing and volunteer roles (ensure DBS checks where needed)
- Confirm insurance documents are secured and suitable
- Collect parental consent forms and medical/emergency info
- Arrange site pre-visit or virtual briefing
- Upload finalised risk assessment to Exeant system
- Conduct staff briefing (safeguarding, roles, emergency plan)
- Brief pupils (behaviour expectations, itinerary)
- Brief volunteers and collect signed Volunteer Code of Conduct (Appendix 3)
- Complete and share Emergency Plan (Appendix 4)

Pre-Departure (1 week to 1 day before)

- Finalise pupil list and headcounts
- Confirm all contact and medical info is current
- Review and print risk assessments
- Pack and check first aid kits and medications
- Confirm travel and accommodation arrangements
- Charge and test trip communication devices
- Load emergency funds onto Trust travel card
- Hold staff review meeting (roles, contingencies)
- Share final itinerary and emergency contacts with parents
- Complete Pre-Departure Checklist (Appendix 6)

During the Visit

- Follow planned supervision ratios and risk mitigations
- Ensure emergency plan and medical info is accessible
- Manage any incidents using established emergency protocols
- Maintain communication with school/trust contact
- Keep receipts and logs for any emergency spending

Post-Visit

- Complete Evaluation Form (Appendix 7) within 10 school days
- Debrief staff and log any incidents/near-misses in Meditracker
- Submit evaluation to Headteacher and EVC
- Conduct financial reconciliation (including emergency fund use)
- Record lessons learned for future trips