



David Ross Education Trust

Broadening Horizons

Educational Trips and Visits Policy and Procedures

Updated: 30th May 2025

Reviewer: H Sharpe

Document Management Information

Applicable to:	All staff in all Academies and Central Support Services including individuals employed by the Trust, contractors and agency staff. All Members and Trustees.
Development and Consultation:	The Policy has been developed in accordance with the 'Guidance for safer working practice for those working with children and young people in education settings', May 2019, and guidance issued by The Outdoor Education Advisers' Panel (OEAP).
Dissemination:	This policy will be made available on the Trust's Policy Centre. It will also be made available on the David Ross Education Trust and individual academy websites.
Implementation:	The Policy will be implemented by the Principal and the designated Education Visits Coordinator.
Training:	The Education Visits Coordinator will receive training in the key requirements to become competent in the implementation of this policy.
Review Frequency:	Three years (unless statutory guidance states more frequent)
Policy Author:	Juliet Jaggs, Director of Inclusion
Executive Policy Owner:	Mark Neild, Deputy CEO and Director of Secondary Education
Approval by:	Senior Executive Team (Education Committee)
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Revision History

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1	Draft Document	25 October 2019
1.1	Approved Document	27 January 2020
1.2	Approved Document	29 September 2021
1.3	Added requirements for sports fixtures, inclusion and joint visits, such as the visits led by the enrichment teams	16 November 2023
1.4	Added further detail regarding conditions under which staff can use their private vehicle	29 August 2024
1.5	Adjusted recommended ratios and procedures for Academy use only	6 August 2025

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1. Introduction

- 1.1. David Ross Education Trust (the Trust) acknowledges the immense value of off-site visits and related activities to young people, and fully supports and encourages those that are well planned and managed. The key to effective and successful outdoor learning and off-site visits is: the right leaders doing the right activities with the right young people in the right places at the right times.
- 1.2. Refer to National Guidance document 1.b [Foundations](#).
- 1.3. The purpose of this document is to link the requirements of David Ross Education Trust with National Guidance and EVOLVE.
- 1.4. The Trust adopts the Outdoor Education Advisers' Panel 'National Guidance' (NG): www.oeapng.info
References in this document hyperlink to specific sections of National Guidance.
- 1.5. The Trust uses the web-based system 'EVOLVE' to facilitate the efficient planning, management, approval, and evaluation of visits www.evolve.online. All staff that lead or accompany visits have their own EVOLVE account, which is set up by their academy's Educational Visits Coordinator (EVC). As well as a planning tool for staff, EVOLVE also contains a variety of features including: search and report facilities, downloadable resources, staff records and visit history, and a link to a National Library www.national-library.info.

2. Policy Scope

- 2.1. This policy applies to all staff in all academies and Central Support Services including individuals employed by the Trust, contractors and agency staff and all Members and Trustees.
- 2.2. It is the responsibility of all individuals in the Trust to familiarise themselves with this policy and comply with its provisions.

3. Legal and Regulatory Framework

- 3.1. This Policy takes its legal framework from the following legislation and statutory guidance, as well as the relevant Outdoor Education Advisors Panel (OEAP) national guidance.
 - Keeping Children Safe in Education 2023
 - SEND Code of Practice
 - EYFS Statutory Framework.

4. Definitions

- 4.1. **Trust** means all Academies within the David Ross Education Trust, as well as Head Office and central services operations.
- 4.2. **Executive Leadership Team** means the Chief Executive Officer ("CEO") and the direct line management reports of the CEO (the "Directors").
- 4.3. **Evolve** means the robust web-based system 'EVOLVE' which facilitates the efficient planning, management, approval, and evaluation of visits www.evolve.online. All staff that lead or accompany visits have their own EVOLVE account, which is set up by their academy's Educational Visits Coordinator (EVC). As well as a planning tool for staff, EVOLVE also includes additional features such as search and report facilities, downloadable resources, staff records and visit history, plus links to National Guidance.

4.4. **Local Learning Area** refers to specified visits/activities within a designated geographical area that are part of the normal curriculum and take place during the normal academy day.

4.5. **Adventurous activities** The following activities are typically regarded as ‘adventurous’:

- All activities in ‘open country’ (see below)
- Air activities (excluding commercial flights)
- Abseiling
- All forms of boating (excluding commercial transport)
- Camping
- Canoeing / kayaking
- Coasteering/coastal scrambling/sea level traversing
- ‘Extreme’ sports
- High level ropes courses
- Hill walking and Mountaineering
- Horse riding
- Motor sport – all forms
- Off road cycling
- Rafting or improvised rafting
- River/gorge walking or scrambling
- Rock climbing (including indoor climbing walls)
- Sailing / windsurfing / kite surfing
- Swimming (all forms, excluding publicly lifeguarded pools)
- Shooting / archery / paintballing
- Snorkel and aqualung activities
- Snowsports (skiing, snowboarding, and related activities), including dry slope
- Trampoline Parks
- Underground exploration
- Use of powered safety/rescue craft
- Water skiing

- Other activities (e.g. initiative exercises) involving skills inherent in any of the above
- 4.6. **Open country** is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the Trust if you think this might apply.
- 4.7. The following activities are not regarded as adventurous but they must be supervised by a member of staff who has previous relevant experience and who in the opinion of the EVC and Principal is competent to supervise the activity:
- Walking in parks or on non-remote country paths
 - Field studies - unless in the environments stated in 'open country'
 - Swimming in publicly lifeguarded pools
 - Theme parks
 - Tourist attractions
 - Pedal go-karts
 - Ice skating (rink)
 - Farm visits
 - Local traffic survey
 - Museum, library, etc.
 - Physical Education and sports fixtures (other than the above)
 - Water-margin activities
- 4.8. **Overseas Expeditions** (for the purposes of this document) are defined as those which typically involve journeying in remote areas of the world and/or in developing countries.
- 4.9. An **External Provider** is defined as where there is an element of instruction, staffing, or guiding, for example:
- Activity Centre
 - Ski Company
 - Educational Tour Operator
 - Overseas Expedition Provider
 - Climbing Wall where instruction is provided by climbing wall staff
 - Freelance instructor of adventurous activities
 - Youth Hostel (where instruction is provided)
 - Voluntary organisation (e.g. Scout Association), where instruction is provided

4.10. For the purposes of this guidance, an External Provider is NOT a:

- Youth Hostel (where accommodation only is used)
- Hotel, B&B, etc.
- Campsite
- Museum, gallery, etc.
- Tourist attraction
- Theme Park
- Farm
- Coach, Train, or Airline company
- Swimming Pool
- Climbing Wall where instruction is provided by a member of your academy's staff with an approved Activity Leader Form (ALF)
- 'Volunteer' instructor of adventurous activities

5. Recording Visits & the 'Local Learning Area'

- 5.1. All visits will be recorded, approved and evaluated via EVOLVE, as this reduces bureaucracy, ensures that a robust audit trail exists, and evidences learning outcomes.
- 5.2. The academy will designate a Local Learning Area, by adapting the template document in EVOLVE/ Resources/Forms. These activities will follow the Standard Operating Procedures set out and should not normally need additional risk assessments or notes added. These activities must be recorded via the EVOLVE Local Visits module before departure. See 'Local Learning Area Policy template' in EVOLVE Resources.

6. Sports Fixtures

- 6.1. The Trust is committed to providing all pupils with opportunities to participate in Physical Education, including sports competitions and fixtures. Each academy will establish its own Sports Fixtures Policy using the template which can be found in EVOLVE resources. These sporting events are typically part of the normal curriculum and take place during the normal academy day and so share some features of events in the local learning area. For this reason, most fixtures will be recorded on EVOLVE via the Local Learning Area module Academy **with the exception of the following events which must be recorded as a full visit on EVOLVE:**

- Sports Tours
- Tournaments
- Any fixture/tour/tournament 20 miles or more from the academy
- Any overnight or Adventurous Sports fixture/tour/tournament

- Activities held at a location other than those listed in the locations section of the Sports Fixture Policy.

7. Approval

- 7.1. Final approval is delegated to the Principal for all visits.
- 7.2. Overseas visits, Residential visits and Adventurous activity visits require Trust approval prior to the Principal sign off. These visits should be submitted to the Trust via EVOLVE at least 28 days in advance.
- 7.3. In approving visits, the Principal and EVC should ensure that the visit leader has been appropriately inducted/trained and is competent to lead the visit.

What Does Approved by the Trust Mean?

- 7.4. When the Principal authorises a visit on EVOLVE, they confirm that the visit complies with academy and Trust policy, and that in their opinion the visit leader and any accompanying staff are competent to supervise the visit.
- 7.5. This task is the responsibility of the Principal/Senior Management, as the Trust does not have first-hand knowledge of the intended participants or the competence of the staff team to make this decision.
- 7.6. The Trust therefore relies on the Principal to make an appropriate professional judgement prior to authorising visits, by taking all aspects into account, including but not limited to:
 - The competence of the visit leader
 - The competence of the accompanying staff
 - The ages, level of maturity of pupils, including those with special needs
 - The intended learning outcomes
 - The proposed itinerary
 - The contingency plans (Plan B) in place
- 7.7. The Trust operates on the basis that the Principal should not approve the visit if they are not satisfied with the intended arrangements. 'Approved by Trust' therefore confirms that the academy appears to have followed the Trust's stated procedures.
- 7.8. The exception to the above is where academy staff lead adventurous activities themselves (i.e. not using an external provider). In these instances, it is unlikely that the Principal will have the necessary technical expertise to assess the competence of the activity leader, and therefore this task is carried out by the Trust.
- 7.9. Refer to National Guidance document 1b [Foundations](#).

8. Outcomes

- 8.1. Clarity regarding the intended outcomes of the visit will help to ensure that the potential benefits can be achieved. Up to four 'intended' outcomes may be recorded on EVOLVE during the planning process, for subsequent evaluation.
- 8.2. Work that takes place outside the classroom can provide a very powerful means of developing

learning in all curriculum areas and raise attainment. Experiential learning can also provide opportunities for development in other areas, including:

- Relationships
- Emotional & spiritual
- Cross curricular
- Individual
- Teamwork
- Environmental

8.3. Preparatory work should take place in advance of the visit where appropriate. This, in conjunction with activity that will take place during the visit, should feed into any follow up work.

8.4. Refer to National Guidance document 5. [1c Learning Outside and Off-site visits: self-evaluation using the Ofsted framework](#).

8.5. [High Quality Outdoor Learning](#) can be used as a tool by visit leaders to assist in both identifying outcomes and in the evaluation of the learning taking place. It can also help the leader in providing clarity to a provider when designing a programme.

9. Inclusion

9.1. Under the Equality Act 2010, it is unlawful to discriminate against disabled participants because of their disability, without material or substantial justification. Academies will make reasonable adjustments to avoid participants being placed at a substantial disadvantage. However, the Equality Act does not require responsible bodies to place employees or participants at inappropriate risk if a health and safety issue arises. Adjustments made to include a disabled young person should not impinge unduly on the planned purpose of the activity.

LGBTQ+ SAFETY AND BELONGING

9.2. The Trust is committed to ensuring that all pupils have the opportunity to engage with visits in ways that affirm their identities. It takes as its guidance current best practice, which should be applied wherever possible, unless the legal context prohibits.

9.3. On overnight educational visits children and young people should be allowed use of an overnight facility that aligns with their gender identity. Pupils should also have access to other facilities, such as toilets and changing rooms, that align with their gender identity.

9.4. Transgender pupils may determine which facilities they feel safest and most comfortable using. Any pupil who is uncomfortable using a shared facility, regardless of the reason, should have access to a safe, practical, and non-stigmatising alternative.

9.5. All pupils and parents/carers should be given the opportunity to express wishes around rooming on visits. Transgender pupils in particular, should be consulted during the trip planning process, to address any potential concerns and needs for privacy. In all cases, pupil will be placed as a top priority.

9.6. If using home stays, pupils who have disclosed their LGBTQ+ status to the trip organizer should be placed in homes that have been assessed for the safety of these pupil's gender or sexual identity should not be disclosed to home stay providers without the pupil's explicit consent.

9.7. Under no circumstances will an LGBTQ+ pupil be denied the opportunity to participate in overnight trips or other opportunities on the basis of their identity. The trip organisers will make all efforts to accommodate any pupil who desires greater privacy on overnight trips. If the context of a trip is inherently unsafe for LGBTQ+ people, it is recommended that the location or context be reconsidered to ensure safe travel for all participants.

9.8. Refer to National Guidance document 3.2e [Inclusion](#).

10. Planning - Risk Management - What to Record and How?

How Much Planning?

10.1. The extent of planning required is related to the complexity of the visit, see:

- [EVOLVE Planning Chart \(pdf\)](#)
- [EVOLVE Planning Chart \(video\)](#)
- National Guidance document 4.3c [Risk Management – an overview](#)

Two levels of documentation: Generic / Event Specific

- 10.2. **Generic documents** can be used to cover the significant risks that you would always expect to manage in any relevant experience or activity. They include National Guidance, Trust, and academy policies. They could include a Local Learning Area policy (see below), and procedures for managing routine activities, such as using transport, supervision of swimming pool changing areas, dismissal of pupils from venues, etc.
- 10.3. **Event Specific** documents should record all significant findings for a particular visit, or they may simply record issues not covered by existing generic documents. Note: If existing generic documents cover everything then there is no need to repeat anything.

Activities Within the 'Local Learning Area'

- 10.4. This refers to specified visits/activities within a designated geographical area that are part of the normal curriculum and take place during the normal academy day. Local Learning Area, activities will follow the Standard Operating Procedures stated, and do not normally need additional documentation. An example 'Local Learning Area' template for adaptation can be found in EVOLVE/Resources/ Forms.
- 10.5. Activities in the Local Learning Area should be recorded via the EVOLVE Local Visits module.

Activities Outside the 'Local Learning Area'

- 10.6. Activities that are not included within your Local Learning Area will be more complex in nature and therefore need additional planning and risk management. These will include the following visit types:
- Day visits that are more complex or further afield;
 - Overseas visits;
 - Residential visits;
 - Adventurous activities.

Planning Meeting

- 10.7. In the early stages of planning, the visit leader will convene a 'Planning Meeting', ideally with all staff involved in the visit. This Planning Meeting will provide the opportunity for information to be shared amongst colleagues, discussions to take place, decisions made, and for relevant details to be recorded. It helps ensure that staff understand the plan and that they have the opportunity to contribute to it. This process of sharing, discussion, decision making, and recording should be ongoing throughout the planning phase.

What to Record and How?

- 10.8. EVOLVE provides a means of recording and sharing visit planning, and enables the EVC and Principal to contribute to, support, and monitor the activity.
- 10.9. 'Risk assessment' is a process, and not a document. HSE legislation dictates that the significant findings of the risk assessment process must be recorded, but it does not state any particular format for this. The 'significant findings' are a combination of the identified issues and what is being done about them. The academy and visit leadership team will decide which of the following two formats works best and will be most useful for them. Event Specific Plan on EVOLVE;
- A mind-map or annotated illustrations (photographed and uploaded to EVOLVE);
 - The DRET risk assessment template /form (uploaded to EVOLVE).
- 10.10. Information recorded could include:
- Planning notes, decisions made, comments, etc.;
 - Participant briefing notes and 'rules';
 - Operating procedures;
 - Event Specific Notes;
 - Risk assessment findings;
 - Other documents, e.g. letter/s to parents, itinerary, kit list, etc.

Additional Notes on Risk Management

- 10.11. It is not possible to eliminate all risks, but these should be reduced to an acceptable or tolerable level. Planning should achieve a rational balance between potential adverse risks and the intended benefits and outcomes of the activity - see [Managing Risk in Play Provision](#). An activity should only take place if, in the professional judgement of the leader, the residual risk following implementation of any control measures is deemed to be acceptable.
- 10.12. It is good practice to involve participants in the planning and organisation of visits, as in doing so they will make more informed decisions, will become more 'risk aware' and hence at less risk. They will also have greater ownership of the event. This is endorsed by HSE in [Principles of Sensible Risk Management](#).
- 10.13. Alternative arrangements (Plan B) should be included within the planning process where appropriate, for example, where weather conditions or water levels might be critical, or where an overcrowded venue might necessitate an alternative option.
- 10.14. Where an adventurous activity is to be delivered by an external provider, the provider will have responsibility for managing the activity (see Section 32). As such, the provider's risk assessments are not the concern of the academy leader, do not need to be requested from the provider, and do not

need to be uploaded to EVOLVE. See National Guidance document 6a [FAQ Asking for a provider's risk assessments.](#)

10.15. To inform future visits, it is good practice to record any significant issues following the visit evaluation.

10.16. See National Guidance documents:

- 4.3c [Risk Management – an overview](#)
- 4.3g [What to Record and How](#)
- 4.3c [Risk Management – some practical advice for leaders](#)

11. Safety During the Visit/Ongoing Risk Assessment

- 11.1. Prior to the visit, staff must ensure that all participants understand what is expected of them. This includes any 'rules' that will be in place. These should be re-emphasised as appropriate during the visit.
- 11.2. The on-going monitoring of all aspects of the visit by the leader and other staff is the single most important aspect in the risk management of visits, and hence safety. This also contributes towards enjoyment and learning.
- 11.3. Where appropriate, activities must be modified (e.g. Plan B) or curtailed to suit changed or changing circumstances, for example: an over-busy lunch area, rain, rising water levels, etc. This is primarily the responsibility of the visit leader, in consultation with other staff where appropriate.
- 11.4. Following the visit, the visit leader should record any significant issues as a note on EVOLVE, for both reference, and to inform future visits.
- 11.5. Refer to National Guidance document 3.4k [Responsibilities of the Visit Leader.](#)

12. Parent/Carer Consent

- 12.1. Written consent from parents is not required for pupils to take part in the majority of off-site activities organised by an academy (with the exception of nursery age children) when these activities, which include sports fixtures, take place during academy hours and as a normal part of a child's education at academy. Parents will always be informed of these activities.
- 12.2. Written consent will be requested for all activities, including sports fixtures listed under 6.1 above, that need a higher level of risk management or those that take place outside academy hours. Parents will be informed of these activities in advance, and given the opportunity to withdraw their child from any particular visit or activity covered by the form. The academy will have a robust means of ensuring that changes to parent/carers contact details and child medical details are up-to-date on Bromcom.
- 12.3. Refer to National Guidance document 4.3d [Parental Consent.](#)

13. Competence to Lead

- 13.1. The competence of the visit leader is the single most important contributory factor in the safety of participants.
- 13.2. The EVC and Principal will consider the following when assessing the competence of a member of staff to lead a visit:

- What experience has the leader in leading or accompanying similar or other visits? (check Staff History on EVOLVE).
- Has the leader completed an e-Learning Visit Leader Training course?
- Is the leader competent in planning and managing visits?
- What are the leader's reasons for undertaking the visit?
- Is the leader an employee of the Trust?
- Does the leader have the ability to manage the pastoral welfare of participants?
- Does the leader exhibit sound decision-making abilities?
- What experience has the leader of the participants they intend to supervise?
- 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?
- If leading adventurous activities, has this been 'approved' by the Trust?
- Is the leader aware of all relevant guidelines and able to act on these?

13.3. Refer to National Guidance document 3.2d [Approval of leaders](#).

14. Staffing and Supervision

- 14.1. There will be an 'effective level of supervision' that has been approved by the EVC and Principal on all visits. *In the first year of any teacher joining the school they will not be able to take children on a school trip unless accompanied by another teacher under the direction of the Principal or EVC.*
- 14.2. The [Statutory Framework for the Early Years Foundation Stage](#) no longer differentiates between outings and on-site settings as regards minimum specified ratios.
- 14.3. For all other visits the visit leader, EVC and Principal must make a professional judgement regarding the number and suitability of staffing on an individual visit basis, after considering the following factors:
- The type, level, and duration of activity.
 - The nature / requirements of individuals within the group, including those with additional needs.
 - The experience and competence of staff and other adults.
 - The venue, time of year and prevailing/predicted conditions, if applicable.
 - The contingency, or 'Plan B' options.
 - As a general rule, the following ratios are to be considered and adjusted to the trip.

- 4+ to be 1:5
- KS1 to be 1:8
- KS2 to be 1:10 (low risk activities, eg walking to Charnwood College, Warning Zone 1:15)

- 14.4. A visit will not go ahead where either the visit leader, EVC, or Principal is not satisfied that an appropriate level of supervision exists.
- 14.5. Particular consideration will be given to the additional implications that may arise if staff are to be accompanied by family members (or partners) on visits.
- 14.6. Refer to National Guidance document 4.2a [Group management and supervision](#).

Vetting and Disclosure and Barring Checks

- 14.7. Staff and volunteers who work frequently or intensively with, or have regular access to young people or vulnerable adults, must undergo an enhanced DBS check with barred list check as part of their recruitment process. For the purpose of this guidance:
- ‘frequently’ is defined as ‘once a week or more’.
 - ‘intensively’ is defined as ‘four or more days in a month, or overnight’.
- 14.8. Refer to National Guidance document 3.2g [Vetting and DBS Checks](#).

Direct, Indirect and Remote Supervision

- 14.9. Young people must be supervised throughout all visits, even though they may be unaccompanied at times.
- 14.10. **Direct supervision:** where a member of staff is with a pupil/group.
- 14.11. **Indirect supervision:** where pupils are unaccompanied by a member of staff, but where there is a member of staff in the vicinity, for example as might occur in a museum or shopping centre, or ‘down-time’ at an activity centre.
- 14.12. **Remote supervision:** where pupils are unaccompanied by a member of staff, and the supervising member of staff is not necessarily in the immediate vicinity, for example as might occur during Duke of Edinburgh expeditions.
- 14.13. Both Indirect and Remotely supervised activities can bring valuable educational benefits, and the progression from dependence to independence is to be encouraged. Such activities develop essential lifelong skills, including learning to manage risk, self-sufficiency, interaction with the public, social skills, communication, decision making, etc.
- 14.14. The decision to allow indirect or remote supervision should be based on professional judgement taking into account such factors as:
- prior knowledge of the individuals (including their maturity and levels of responsibility);
 - venue and conditions;
 - the activity taking place;
 - preparatory training;
 - the competence of the supervising staff;

- the emergency systems in place.

14.15. When recording a remote supervision on EVOLVE, there will still be a named visit leader. This will be the member of staff that has made a professional judgement regarding the level of responsibility and maturity of the participants and decided that in their opinion it is reasonable for them to be undertaking the specific activity unaccompanied by an adult. A 'Note' should be added to EVOLVE specifying that remote supervision applies.

14.16. Refer to National Guidance documents:

- 4.3b [Ratios and Effective Supervision](#)
- 4.2a [Group Management and Supervision](#)
- 3.2g [Vetting and DBS Checks](#)

15. First Aid

15.1. All visits will be accompanied by a responsible adult with a good working knowledge of first aid appropriate to the environment (e.g. urban, remote, water, etc).

15.2. A 3 hour non-assessed 'Basic Skills' course is suitable for routine urban visits. However, the nature of the visit may indicate that a higher level qualification is appropriate, especially in circumstances where it is likely that access by the emergency services may be delayed.

15.3. Based on the nature of the particular visit, the EVC (or visit leader) should make a professional judgement regarding the level of first aid required.

15.4. A first aid kit appropriate to the visit will always be carried.

15.5. For EYFS outings, at least one member of staff will hold a current Paediatric First Aid certificate.

15.6. Refer to National Guidance document 4.4b [First Aid](#).

15.7. Refer to: [Statutory Framework for the Early Years Foundation Stage](#).

16. Insurance

16.1. The Trust's insurance for trips is covered by the RPA. A summary of the scheme is available. [Insurance overview](#).

16.2. Trip leaders should keep claim details readily available and contact the scheme as soon as a potential claim event arises.

16.3. For travel within the European Union all participants must hold a valid GHIC (Global Health Insurance Card) in accordance with requirements [Global Health Insurance Card](#).

16.4. Refer to National Guidance document 4.4c [Insurance](#).

17. Transport

17.1. Refer to National Guidance document 4.5a [Transport general considerations](#).

Private Cars

17.2. Private staff cars are not permitted for academy use unless in an emergency and with the permission of the principal. In such cases the driver must be accompanied by a second adult.

Coaches

- 17.3. The Trust does not ‘approve’ coach companies. Whilst UK legislation ensures that coach companies are fit for public use, the facilities available on coaches may vary. Liaising with other academies within the Trust that have used a particular company (via a search on EVOLVE) will help to determine the level of service that may be provided.
- 17.4. Refer to National Guidance document 4.5e [Hiring a coach](#).

Minibuses

- 17.5. Academies that own or hire a minibus will have an operational policy in place its safe use.
- 17.6. Refer to National Guidance document 4.5b Transport in minibuses
- 17.7. ***Public Transport in London***
- 17.8. For public transport within the Greater London area contact ‘Transport for London’, who offer free travel for academy parties on London buses, Underground, Tramlink, and Docklands Light Railway, to cultural destinations.
- 17.9. See [Transport for London – Academy Parties](#) Tel. 0343 222 1000 Email. academyparty@tfl.gov.uk

18. Farm Visits

- 18.1. Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.
- 18.2. Refer to National Guidance document 7g [Farm Visits](#).

19. Water-Margin Activities

- 19.1. This section applies to:
- 19.2. Activities that take place near or in water – such as a walk along a riverbank or seashore, collecting samples from ponds and streams, or paddling or walking in gentle, shallow water*. It does not apply to swimming and other activities that require water safety or rescue qualifications and equipment, or water-going craft.
- 19.3. * ‘gentle’ means hardly moving at all.
- 19.4. ‘shallow’ typically means up to the knees of the participants.
- 19.5. If the activity **exceeds** the above definition, then this is classed as a water-based adventurous activity needing Trust approval, and Section 25 applies.
- 19.6. If the activity falls **within** the above definition, this is classed as a ‘water-margin’ activity and the following applies:
- a) All staff involved in the activity will be conversant with, and adhere to the guidance contained within National Guidance document 7i [Group Safety at Water Margins](#). This document must be made available to all supervising adults in advance of the visit.
- b) Staff must ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.
- c) As with all visits, there must be an approved alternative ‘Plan B’ that could be used where conditions dictate, and for which parental consent has been obtained if necessary.

d) Although Trust approval is not required for water-margin activities, the leader must have previous relevant experience, and must be assessed as competent to lead the activity by the EVC and/or Principal.

19.7. Refer to National Guidance document 7i [Group Safety at Water Margins](#).

20. Residential Visits

20.1. The Trust acknowledges the immense educational benefits that residential visits can potentially bring to children and young people, and fully supports and encourages residential visits that are correctly planned, managed, and conducted.

20.2. Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

20.3. [A Guide to High Quality Outdoor Learning and Residential Experiences](#) can be used as tools by visit leaders to assist in both identifying outcomes and in the evaluation of the learning taking place. It can also help the leader in providing clarity to a provider when designing a programme.

20.4. Refer to National Guidance document [4.2b Residential Visits](#).

21. Overseas Visits

21.1. The Trust acknowledges the immense educational benefits that overseas visits can potentially bring to young people, and fully supports and encourages overseas visits that are correctly planned, managed, and conducted.

21.2. Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

21.3. For all visits it is essential that consideration is given to the following:

- a) Culture: food and drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information, alcohol & drugs.
- b) Accommodation: checked for suitability, security, safety precautions and emergency evacuation.
- c) Transport systems have been assessed as safe for use.

21.4. The visit leader should consider the relevant country information from the Foreign and Commonwealth Development Office website: www.fco.gov.uk (from the home page select 'Travel Advice'). All relevant FCO information should be circulated amongst the staff team.

21.5. For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid GHIC (Global Health Insurance Card). See www.dh.gov.uk

21.6. For **Exchange Visits**: Refer to National Guidance document 7f [Exchanges and home stays](#).

21.7. For **Overseas Expeditions** See Section 28.

22. Weather, Clothing and Survival

22.1. Wherever possible, the leader will obtain and act upon recent weather forecasts and local advice.

22.2. Participants should be adequately clothed appropriate to:

- The time of year, prevailing weather conditions, altitude and exposure to elements;

- Likely changes in weather;
- The experience and strength of the party;
- The nature of the visit and environment.

22.3. When venturing away from immediate help, leaders should consider the need for:

- Comfort, insulation and shelter for a casualty;
- Comfort, insulation and shelter for the whole group;
- Provision of emergency food and drink;
- Torch;
- Possible need of signalling equipment and/or mobile phone (NB. Mobile phones may not work in remote areas);

22.4. It is primarily the responsibility of the visit leader, in consultation with other staff where appropriate, to modify or curtail the visit or activity (e.g. Plan B) to suit changed or changing circumstances - for example: over-busy lunch area, rain, rising water levels, etc.

23. Swimming

- 23.1. The Trust acknowledges the immense educational benefits that swimming activities can potentially bring to young people, and fully supports and encourages swimming activities that are correctly planned, managed, and conducted.
- 23.2. Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions
- 23.3. All swimming activities and venues must be included within the visit plan, and lifeguarding arrangements checked in advance. This is particularly important in respect of visits abroad, where for example, a hotel pool may be available.
- 23.4. Pupils must be supervised by a competent adult at all times whilst undertaking swimming activities. The following criteria apply:

Swimming pools (lifeguarded)

- 23.5. Trust Approval is not required:
- UK Swimming Pool safety is guided by various Health and Safety at Work Acts and Regulations. Pool operators have a duty to take all reasonable and practicable measures to ensure that teaching and coaching activities are conducted safely.
 - For publicly lifeguarded pools abroad, academy staff must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water.
 - Unless suitably qualified, academy staff should not have responsibility for lifeguarding. However, they do retain a pastoral role for participants at all times either through direct or 'remote' supervision.

- For swimming lessons, the Trust academy should ensure the swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to current guidelines.

23.6. Refer to National Guidance document 7.x [Swimming pools](#).

Hotel (and other) Swimming Pools

23.7. Academies should check the lifeguarding position in advance.

23.8. Trust Approval is not required for this activity.

23.9. If lifeguarding arrangements are not provided at the pool then the visit leader will bear the full responsibility for ensuring swimming safety, and approval to lead the activity will be required via EVOLVE.

23.10. The following awards/qualifications apply:

For free swimming activity

- A valid RLSS UK National Pool Lifeguard Qualification (NPLQ), or equivalent in the country visited - see www.lifesavers.org.uk

For structured or programmed activity

- A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC) or equivalent - see www.lifesavers.org.uk or
- A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement.

23.11. The role of the lifeguard is:

- To directly supervise the pool and the pool users, exercising appropriate levels of control. (Note: the lifeguard should remain on the poolside at all times except in the case of an emergency).
- If necessary, brief pool users in advance regarding rules (e.g. no diving, running, etc.).
- To communicate effectively with pool users.
- To anticipate problems and prevent accidents.
- To intervene to prevent behaviour which is unsafe.
- To carry out a rescue from the water.
- To give immediate first aid to any casualty.

23.12. The above must be accomplished in the context of the normal operating procedures and the emergency plan for the pool, which should be considered before swimming takes place. Full familiarisation of the systems described should be walked through at the pool.

23.13. Staff must be aware of the procedures in the event of an emergency, and who at the venue will provide back up. Staff should also know if they have exclusive use of the pool, as other pool users may increase the supervision role of your lifeguard.

23.14. If a young person holds an appropriate qualification, then their role could be emergency lifeguard

action. Supervision will remain the responsibility of the academy's staff.

23.15. Refer to National Guidance document 7x [Swimming pools](#).

Open water swimming (i.e. not in a swimming pool and not a 'water-margin' activity)

23.16. Trust Approval is required via EVOLVE.

23.17. Particular consideration should be given to the following factors:

- Unknown locations and hazards, especially overseas.
- Changing environmental conditions.
- Supervisor complacency.
- Adherence to local advice.
- Preparation and knowledge of young people, i.e. is it a planned activity?

23.18. The designated lifeguard must be dedicated exclusively to the group, and the location used must fall within the RNLI/RLSS definition of a 'safer bathing area'. Local advice must always be sought.

For free swimming activity

- A valid National Beach Lifeguard Qualification (NBLQ) or equivalent in the country visited, see www.lifesavers.org.uk Note: this is for beach/sea only, not inland water. or

For structured or programmed activity

- A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC) or equivalent - see www.lifesavers.org.uk or
- A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement. see www.lifesavers.org.uk

23.19. Refer to National Guidance document 7o [Natural Water Bathing](#).

24. Adventurous Activities

24.1. This section is applicable to all adventurous activities except the following, for which separate guidance applies:

- Water-based activities
- Open country activities
- Snowsports
- Overseas expeditions
- Trampoline Parks

24.2. The Trust acknowledges the immense educational benefits that adventurous activities can potentially bring to young people, and fully supports and encourages adventurous activities that are correctly planned, managed, and conducted.

- 24.3. Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.
- 24.4. The responsibility for the safety of participants in an adventurous activity will rest with either:

An external provider

- 24.5. The provider must hold an [LOtC Quality Badge](#) or complete a Provider Form (**Appendix A**).
- 24.6. Note: If a Provider holds an [AALA licence](#) (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required.
- 24.7. Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.

or

A Member of your Academy's Staff

- 24.8. This person must be specifically approved by the Principal to lead the activity, via EVOLVE.

25. Water Based Activities

- 25.1. For clarification between water-margin and water-based activities see Section 19
- 25.2. The Trust acknowledges the immense educational benefits that water-based activities can potentially bring to young people, and fully supports and encourages water-based activities that are correctly planned, managed, and conducted.
- 25.3. Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.
- 25.4. The following are not regarded as adventurous activities for the purposes of this guidance:
- Swimming in publicly lifeguarded pools
 - Water-margin activities as defined in Section 19
 - Commercial craft, tourist boat trips, and similar activities for which young people would not normally wear personal buoyancy.
- 25.5. With the exception of the above, all other forms of water-based activities are regarded as adventurous activities.
- 25.6. The responsibility for the safety of participants in an adventurous activity will rest with either:

An External Provider

- 25.7. The provider must hold an LOtC Quality Badge or complete a Provider Form
- 25.8. Note: If a Provider holds an AALA licence (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required.
- 25.9. Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.

or

A Member of your Academy's Staff

- 25.10. This person must be specifically approved by the Principal to lead the activity, via EVOLVE.
- 25.11. In order to participate in water-based activities, participants should be water confident. Participants who lack water confidence may still be able to take part subject to consideration of all factors, including the activity itself and supervision arrangements. The level of water confidence of all participants must be known by the activity leader prior to the commencement of water-based activities.
- 25.12. Leaders should have knowledge of the water conditions/hazards (and potential changes) that might be encountered and prepare accordingly. Local advice must be sought where appropriate, e.g. coastguard, harbour master, other site users, etc.
- 25.13. Personal buoyancy conforming to the appropriate National Governing Body must be worn at all times by all participants in water-based activities, except, at the discretion of the activity leader, where the activity:
- takes place in a swimming pool, or
 - is 'swimming', or
 - is an activity for which personal buoyancy would not normally be worn by young people.

26. Open-country Activities

- 26.1. The Trust acknowledges the immense educational benefits that open-country activities can potentially bring to young people, and fully supports and encourages open-country activities that are correctly planned, managed, and conducted.
- 26.2. For the purposes of Trust approval, 'open-country' is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the Trust if you think this might apply.
- 26.3. The responsibility for the safety of participants in the activity will rest with either:

An External Provider

- 26.4. Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.

or

A Member of your Academy's Staff

- 26.5. This person must be specifically approved by the Principal to lead the activity, via EVOLVE.
- 26.6. The following minimum levels of technical competence apply where a member of the academy's own staff intends to lead an open-country activity:
- a) For leaders of walking groups outside the UK or Ireland,
 - International Mountain Leader Award (IML) www.mltuk.org
 - b) For leaders of walking groups in mountainous terrain within the UK and Ireland
 - Mountain Leader Award (ML) Summer or Winter as appropriate www.mltuk.org or
 - A written statement of competence by an appropriate technical adviser

c) For leaders of walking groups in summer conditions in non-mountainous hilly terrain

(Known variously as upland, moor, bog, hill, fell or down), with well-defined obvious boundaries, such as roads and coastlines, and where any hazards within it are identifiable and avoidable, and where wild camping or movement on steep ground is not involved.

- Hill & Moorland Leader Award (HMTrust) www.mltuk.org or

- A written statement of competence by an appropriate technical adviser

d) For leaders of walking groups in terrain 'easier' than that defined in c)

- The leader must demonstrate an appropriate level of competence. This may include one or more of the following:

- Countryside Leader Award (CTrust) www.countrysideleaderaward.org
- Lowland Leader Award (LTrust) www.mltuk.org
- Sports Leaders UK Level 3 Award in Basic Expedition Leadership (BEL) www.bst.org.uk
- Completion of a suitable 'Leader Training' Course.
- A written statement of competence by an appropriate technical adviser
- Evidence of recent, relevant experience, appropriately corroborated.
- An assessment of competence (written or implied) by the Principal.

27. Snowsports

27.1. The Trust acknowledges the immense educational benefits that snowsport activities can potentially bring to young people, and fully supports and encourages snowsport activities that are correctly planned, managed, and conducted.

27.2. Snowsports (e.g. skiing and snowboarding) are regarded as adventurous activities, and the visit therefore requires Trust approval.

27.3. There are advantages to snowsports taking place during term time as opposed to during the academy holiday period. These include: greater choice generally, less queueing for lifts, less crowded slopes therefore less chance of collisions occurring, less crowded resort, higher possibility of 'sole use' of accommodation, lessons more likely to be conducted by permanent snowsport academy instructors (as opposed to 'casual' instructors), greater likelihood of English speaking instructors, considerable cost savings through avoiding high season (possibly allowing more young people to participate), etc.

27.4. The following courses are recommended for all staff involved in organising or accompanying snowsports visits (but not instructing, leading or supervising on snow):

Snowsport Visits Training Course (SVT) administered by EVOLVE
Advice <http://www.evolveadvice.co.uk/svt>; or

Snowsport Course Organiser Award (SCO) administered by Snowsport
England www.snowsportengland.org.uk

27.5. In addition the leader must have previously accompanied at least one educational snowsports visit.

- 27.6. Young people may only participate in snowsports when under the direction of an appropriately qualified and competent person. This would normally be an instructor employed by the local snowsports academy. Academies should therefore consider the merits of fully instructed lessons of 4/5 hours duration per day.
- 27.7. Helmets must be worn by all participants in snowsport activities.
- 27.8. A member of staff intending to lead skiing or snowboarding (i.e. not using a ski academy) must be qualified as below and have been approved by the Principal via EVOLVE
- 27.9. **Skiing:** The minimum qualification to lead skiing on snow is:
- The Alpine Ski Course Leader Award (ASCL) www.snowsportengland.org.uk or
 - The Alpine Ski Leader Award (ASL) www.snowsportscotland.org or
 - A statement of competence by an appropriate 'technical adviser'
- 27.10. **Snowboarding:** The minimum qualification to lead snowboarding on snow is:
- The Snowboard Leader Award (SBL) administered www.snowsportscotland.org or
 - A statement of competence by an appropriate 'technical adviser' - see Section 30
- 27.11. Pupils may only take part in off-piste activities if:
- a) under the direction of a suitably qualified local instructor, AND
 - b) they will remain within the designated controlled areas, AND
 - c) off-piste activities are specifically included within the visit insurance policy, AND
 - d) a NOTE is added to EVOLVE in advance of the visit, confirming that the above criteria are/will be complied with.
- 27.12. Important: Owing to unacceptable liability waiver requirements, currently Trust Academies must not use the following resorts: Vail, Beaver Creek, Breckenridge, Keystone and Heavenly Lake Tahoe, until further notice. For other resorts in USA or Canada, the academy must check the liability position prior to making a commitment.
- 27.13. Refer to National Guidance document 7.v [Snowsport visits](#).

28. Overseas Expeditions

- 28.1. The Trust acknowledges the immense educational benefits that overseas expeditions can potentially bring to young people, and fully supports and encourages overseas expeditions that are correctly planned, managed, and conducted.
- 28.2. Overseas Expeditions will only be approved by the Trust if the provider either:
- a) Holds an LOTC Quality Badge www.lotcqualitybadge.org.uk or
 - b) Provides a statement of compliance with [Guidance for Overseas Expeditions, Edition 4](#).
- 28.3. For providers that do not hold an LOTC Quality Badge, 'Guidance for Overseas Expeditions, Edn.4' should be referred to when the proposal is initiated. This document contains information for both Academies and providers and includes a checklist of vital aspects that **must** be considered prior to the academy making a commitment with an external provider. Overseas expedition providers are

required to comply with the minimum standards specified in this document.

28.4. When planning an expedition and selecting a provider, Academies should particularly consider the educational aims of the venture, that appropriate progression takes place, and that the requirements relating to 'Best Value' are met.

28.5. Refer to National Guidance document Overseas Expeditions as above in 28.2 b)

29. Trampoline Parks

29.1. The Association for Physical Education (AfPE)'s view is that trampolining is suitable for teaching in secondary Academies only. It is seen as one of the higher risk activities, and as such, those teaching it must have undertaken specific trampolining qualifications. AfPE currently recommends that Academies do not arrange visits for pupils to Trampoline Parks.

29.2. Please note that the above does not apply to trampoline clubs or centres which are registered with British Gymnastics. These activities are not classified as 'adventurous', and Academies intending to visit these facilities should comply with current AfPE guidance.

30. Emergency Procedures

30.1. Academies should ensure that their Health and Safety policy includes off-site visits.

30.2. Staff involved in a visit must be aware of and adhere to their academy's policy on emergency procedures.

30.3. In the event of an emergency, Academies should either use the EVOLVEgo app, or use other means of recording events and information.

30.4. For visits that take place outside normal academy hours:

- A completed Emergency Card – Visit Leader (**Appendix B**) (or equivalent) must be with the Visit Leader at all times, and
- A completed Emergency Card – Home Contacts (**Appendix C**) (or equivalent) must be with the emergency home contact(s) at all times, where access to EVOLVE is not possible.

30.5. In an emergency, if it is not possible to reach any of the designated academy emergency contacts, the leader should call the Trust 24 hour emergency number (**Appendix D**).

30.6. Refer to National Guidance Documents:

- 4.1i [Emergencies and critical incidents](#)
- 4.1b [Emergencies – The academy's role](#)
- 4.1c [Emergencies – Guidance for leaders](#)

31. Approval of Staff to Lead an Adventurous Activity

Procedure for Obtaining Approval

31.1. Staff who wish to lead (i.e.. supervise or instruct) an adventurous activity, should first upload details and scanned copies of all relevant qualifications (e.g. instructor certificates, first aid, etc) to the 'My Details' section of their EVOLVE account.

31.2. The visit leader should complete the Visit Form on EVOLVE as usual. During this process EVOLVE will

ask for an Activity Leader Form (ALF) to be completed, which will request further details regarding the proposed venture (e.g. dates, venues, numbers, etc). The ALF will then be embedded within the Visit Form for that particular visit.

- 31.3. On receipt of a Visit Form (and embedded ALF), the Principal should view the proposed activity in the context of the leader's competencies and qualifications. If the Principal does not have the competence to make this judgement then they should enlist the help of a suitably qualified 'Technical Adviser' see below, or contact the Trust for further advice.

Criteria for Approval

- 31.4. Approval should normally be granted where the leader of the activity has recent relevant experience, and:
- is appropriately qualified through the relevant National Governing Body, or
 - has a 'Statement of Competence' from an appropriate 'technical adviser' – see below.
- 31.5. In cases where no National Governing Body exists, the decision should be based on factors which may include: technical advice, the leader's stated competence, observed competence, past experience, and attendance at training courses.
- 31.6. Approval should always be subject to a requirement that the leader must act at all times within the remit of their qualifications, and in accordance with National Governing Body Guidelines where these exist.

Technical Adviser

- 31.7. For further clarification regarding a technical adviser see National Guidance document 6h [Adventure Activity Qualifications](#).
- 31.8. For most activities the competence required of a technical adviser is stipulated by the activity's National Governing Body.

32. Using an External Provider

- 32.1. The decision about the use of an external provider is the responsibility of the visit leader, EVC, and Principal. The Trust does not maintain a list of 'approved' external providers or tour operators. Academies will find it useful to 'Search by External Provider' on EVOLVE and liaise with other Trust Academies that have used a particular provider.
- 32.2. Academies should consider the requirements under 'best value' when selecting an external provider.
- 32.3. To confirm that all aspects of the operation of the provider are satisfactory, the academy must ensure that either:
- a) The Provider holds an LOTC Quality Badge www.lotcqualitybadge.org.uk or www.kaddi.com
 - or
 - b) A 'Provider Form' has been satisfactorily completed by the provider
- 32.4. Note: If a Provider holds an [AATrust](#) licence (and/or any other accreditation) but not an LOTC Quality Badge, then a Provider Form is still required.

Procedure for Providers that hold an LOTC Quality Badge

- 32.5. No further action is necessary, other than to check the suitability of the provider/venue in relation to

the intended aims or learning outcomes for the particular group.

Procedure for Providers that do not hold an LOTC Quality Badge

- Download a Provider Form from EVOLVE Resources.
 - Complete the top section.
 - Send Provider Form to the provider.
 - On its return check that it has been satisfactorily completed.
 - Upload the completed Provider Form to EVOLVE.
- 32.6. Important: If the Provider has made any alterations to the wording of the Provider Form or is unable to comply, then you must discuss this with the Provider, and if necessary seek advice from the Trust prior to making a commitment with the Provider.
- 32.7. The Provider Form should be sent to the provider at the time of making a provisional booking and no deposits should be committed prior to its satisfactory completion and return.
- 32.8. The satisfactory completion of a Provider Form does not necessarily signify that the service on offer will be appropriate for the young people from your academy. A pre-visit and recommendation from previous users will help you decide on its suitability.
- 32.9. In some instances, for example where an academy intends to use an 'external', voluntary individual for services, then this person may be regarded as a temporary member of staff and the procedure outlined above may be appropriate.
- 32.10. See National Guidance documents:
- 4.4h [Using external providers and facilities](#)
 - 6a FAQ [Asking for a provider's risk assessments](#)

33. Training and Awareness

- 33.1. The Trust will ensure that all individuals outlined in 2.1 understand their responsibilities under this Policy by providing appropriate training, education and guidance. The level of training and the nature of the education and guidance may vary depending upon the role as relevant to the policy.

34. Record Keeping

- 34.1. The Trust will retain records evidencing compliance with this policy, as set out in the Trust's Data Retention Policy.
- 34.2. Records kept in connection with conflicts of interest and related party transactions must be compliant with the Trust's policy on General Data Protection Regulation ("GDPR") Compliance.

35. Roles and Responsibilities

- 35.1. The Health and Safety at Work Act 1974 places overall responsibility for health and safety on educational visits with The Trust:
- 35.2. All persons involved in a visit have a specific responsibility which they should be clear about prior to the visit taking place.

- 35.3. Refer to National Guidance documents 5.2b [Planning Basics](#) and [Checklists](#)

Role of the Educational Visits Coordinator

- 35.4. To help fulfil its health and safety obligations for visits, academies will appoint an Educational Visits Coordinator (EVC) who will support the Principal. In small academies the Principal may be the EVC.
- 35.5. 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 academy. Commonly, but not exclusively, such competence will be identified in a person on the senior management of the academy.
- 35.6. The EVC will attend initial EVC training as soon as possible after appointment. Subsequent update training or a repeat full course will be offered to those who are involved in the role infrequently.
- 35.7. The EVC should support the Principal in ensuring that competent staff are assigned to lead and accompany visits and with approval and other decisions.
- 35.8. The EVC must ensure that this policy is shared with all academy staff running educational visits.
- 35.9. Academies will use the checklists provided by National Guidance to support the effective planning of educational visits.
- 35.10. Refer to National Guidance [Educational Visits Coordinator](#).

36. Reporting and Consequences of Non-Compliance

- 36.1. Regional Directors will monitor the implementation of this policy during routine quality assurance and auditing procedures. Academy leaders will report their compliance with this policy as part of the routine reports to Regional Directors and the Director of Primary and Secondary as appropriate. These reports will also be shared with the local Academy Scrutiny Committee. The Head of Safeguarding reports to the Trustees via the Education Committee throughout the year.
- 36.2. Non-compliance will be addressed through the Trust's disciplinary procedures.

37. Policy Status

- 37.1. This policy does not form part of any employee's contract of employment.

38. Related documentation

- 38.1. This policy is related to the following other Trust documents:

- Safeguarding and Child Protection Policy
- SEND Policy
- Looked After Children Policy
- Supporting Pupils with Medical Needs Policy
- Behaviour and Ethos Policy
- Anti Bullying Policy
- Child on Child Abuse Policy
- Transgender Pupil Policy

- Exclusion Policy
- Health & Safety Policy
- Academy Curriculum documentation

Appendix A

For completion by 'external providers' that do not hold an LOTC Quality Badge

Providers that do not hold an LOTC Quality Badge are required to complete and return this form in advance of the establishment making a commitment.

Establishment..... Staff member in charge.....

Date(s) of visit..... Name of provider.....

The provider or tour operator providing services to the establishment named above is asked to give careful consideration to the statements below and sign in the space at the end of the form to indicate that the standard of service will meet the conditions listed. Please tick all specifications you can meet, indicate by a cross any you cannot meet, and write N/A against any specifications which do not apply to your provision.

Section A should be completed for all visits. Sections B (adventure activities), C (tour operators) and D (expeditions) should also be completed if applicable.

SECTION A - ALL VISITS

Health, Safety, and Emergency Policy

1. The provider complies with relevant health and safety regulations, including the Health and Safety at Work Act 1974 and associated regulations for visits taking place in the UK, and has a health and safety policy and recorded risk assessments which are available for inspection. ☐
2. Accident and emergency procedures are maintained and records are available for inspection. ☐

Vehicles

3. All vehicles are roadworthy and meet the requirements of relevant regulations in the country in which they are being used. ☐

Staffing

4. All reasonable steps are taken to check staff who have access to young people for relevant criminal history and suitability to work with young people. ☐
5. There are adequate and regular opportunities for liaison between establishment staff and the provider's staff and there is sufficient flexibility to make changes to the programme if necessary and the reasons for such changes will be made known to establishment staff. ☐
6. The provider has never been dismissed from any employment or had a contract ended. ☐

Insurance

7. The provider has public liability insurance for at least £5 million with a clause giving 'indemnity to principal'. ☐

Accommodation (if provided)

8. UK accommodation has a current fire risk assessment and is safe from the hazards of fire. ☐
9. If abroad, the accommodation complies with fire, health and safety regulations which apply in the country concerned. ☐
10. There are appropriate security arrangements to prevent unauthorised persons entering the accommodation. ☐
11. Separate male and female accommodation and washing facilities are provided and staff accommodation is close to participants' accommodation. ☐

GDPR

12. The Provider complies with GDPR and will process the academy's data appropriately. ☐

SECTION B - ADVENTURE ACTIVITIES AND FIELD STUDIES IN OUTDOOR ENVIRONMENTS

13. Adventure Activities Licensing Authority (AALA) Licence covering dates of visit ☐ YES ☐ OUT OF SCOPE
14. If YES, AALA Licence number R

For AALA licensable activities in the UK, the specifications in this section are checked as part of the AALA inspection. However, providers licensed with AALA are asked to consider these specifications with respect to any activities or

aspects of provision not covered by the licence.

Activity management

15. The provider operates a policy for staff recruitment, training and assessment which ensures that all staff with a responsibility for participants are competent to undertake their duties. ☐
16. The provider maintains a written code of practice for activities which is consistent with relevant National Governing Body guidelines and/or, if abroad, the relevant regulations of the country concerned. ☐
17. Staff competencies are confirmed by appropriate National Governing Body qualifications for the activities to be undertaken, or staff have had their competencies confirmed in writing by an appropriately experienced and qualified technical adviser. ☐
18. Where there is no National Governing Body for an activity, the provider has a Code of Conduct for that activity which is in line with current good practice within the UK, and this includes appropriate instructor competencies. ☐
19. Participants will at all times have access to a person with an appropriate First Aid qualification. Staff are practiced and competent in accident and emergency procedures. ☐
20. There is a clear definition of responsibilities between providers and visiting staff regarding supervision and welfare of participants. ☐
21. All equipment used in activities is suited to task, adequately maintained in accordance with statutory requirements and current good practice, with records kept of maintenance checks where necessary. ☐

SECTION C - TOUR OPERATORS

Where a tour operator delivers services to establishments using other providers eg. ski establishments, transport operators or accommodation, the tour operator must ensure that each provider meets the relevant specifications outlined in Sections A and B of this form and that these providers operate to standards which meet the relevant regulations which apply to the country of operation.

22. Sections A and B of this form, as appropriate, have been completed to show that checks have been made. Records are available for inspection. ☐
23. The Tour Operator complies with the package travel regulations, including bonding to safeguard customers' monies. ☐
24. ATOL, ABTA or other bonding body name and numbers..... ☐

SECTION D - OVERSEAS EXPEDITIONS

25. The provider complies with 'Guidance for Overseas Expeditions, Edition 5' (GOE5). ☐

If any of the above specifications cannot be met or are not applicable, please give details:

Details of any other accreditation, eg with National Governing Bodies, tourist boards, etc.

DECLARATION

I hereby certify that I am an authorised signatory to enter into this Agreement and to bind the said company, firm, person or corporation to the terms and conditions herein.

Signed Date.....

Name (print)..... Position in organisation.....

Full name and address of company, firm, person or corporation.....

.....

Tel..... E.mail.....

Appendix B

EMERGENCY CARD

(VISIT LEADER)

Emergency Card (Visit Leader)

This 'card' or the EVOLVEgo app must be with the Visit Leader at all times.

In the event of an incident, the Visit Leader should adopt the following protocol:

1. Assess the situation;
2. Safeguard uninjured members of the group (including self);
3. Attend to any casualties;
4. Call emergency services, if appropriate
5. Start recording information/decisions via the EVOLVEgo app, or otherwise.

Then:

If the incident DOES NOT involve serious injury or fatality, and/or is not likely to attract media attention, the Visit Leader should:

- Contact the academy emergency contact/s. (This should include a member Senior Management).
- Report the incident and seek advice.
- Follow the academy Emergency Action Plan. (It is not necessary to contact the Trust).

If the incident DOES involve serious injury or fatality, and/or is likely to attract media attention, the Visit Leader should:

- Contact the academy emergency contact/s. (This must include a member of Senior Management).
- Report the incident and seek advice.
- Follow the academy Emergency Action Plan.
- Your emergency contact should liaise with the Trust (via the number below).
- You will be contacted back as soon as possible by your emergency contact or the Trust/employer.
- If appropriate, you will be provided with a dedicated number to refer all press, media, parental, or other enquiries to.
- Contact the British Consulate / Embassy if abroad.
- If practicable, delegate party leadership to a Deputy Leader, in order that you can be contactable at all times, and to enable you to coordinate all necessary actions.
- Wherever possible, prevent group members from using mobiles or going online until such time as this has been agreed by the Trust/employer.
- Advise all group members to direct all enquiries to the Group Leader, and to get approval from the Group Leader before discussing with anyone else.

When the incident is under control:

- Seek full details of the incident, how and why it happened so far as can be established at this stage.
- Maintain a detailed log of all actions taken and conversations held, together with a timescale, - via the EVOLVEgo app or otherwise. Take photos if appropriate (it may be beneficial to ask someone else to do this).

Name	Home	Mobile
Academy/Establishment		
Trust Emergency Contact		

Name	Home	Mobile
Establishment 'Home' Contact		
Head of Establishment		
Chair of Governing Body		
EVC/Deputy/Other		

Emergency Card (Home Contacts)

For visits that take place outside normal hours.

This 'card' or the EVOLVEgo app must be available to the emergency contacts at all times.

The academy/establishment's Emergency Home Contact(s) should have ready access to all visit information, including itinerary, venue details, names, medical information, and emergency contact details for all participants, including staff. This can be either online via EVOLVE, or in hard copy.

In the event of being contacted by the Visit Leader (or other member of staff involved in a visit), you should:

- Confirm the phone number at which the caller can be contacted back on.
- Note their location.
- Determine the nature of the emergency.
- Determine the type of help required.

Then:

If the incident DOES NOT involve serious injury or fatality, and/or is not likely to attract media attention:

- Provide the required assistance if possible.
- Seek further advice or pass on details to other establishment contacts who may be able to assist.
- It is not necessary to contact the Trust.

If the incident DOES involve serious injury or fatality, and/or is likely to attract media attention:

- Follow your academy/establishment Emergency Action Plan.
- Inform the Visit Leader that someone will phone him/her back as soon as possible.
- Contact the Trust Emergency Contact number, SEE BELOW.
- Your details will be taken and you will be phoned back as soon as possible.
- Contact your Head of Establishment (if this is not you).

When the incident is under control:

- Seek full details of the incident, how and why it happened so far as can be established at this stage.
- Maintain a detailed log of all actions taken and conversations held, together with a timescale, - via the EVOLVEgo app or otherwise. Take photos if appropriate (it may be beneficial to ask someone else to do this).

Name	Home	Mobile
Academy/Establishment		
Trust Emergency Contact		
Employer Emergency Contact (Academy)		
Establishment 'Home' Contact		
Head of Establishment		

Name	Home	Mobile
Chair of Governing Body		
EVC/Deputy/Other		

Appendix D

Contacts

EVOLVE	www.evolve.online
Educational Visits Adviser	EVOLVE Advice advice@evolveadvice.co.uk
Health & Safety	Brian Edwards BEwards@dret.co.uk
Insurance	Finance@dret.co.uk

EVOLVE www.evolve.online

Kaddi Provider Database www.kaddi.com

National Guidance www.oeapng.info

EVOLVE Advice App www.evolveadvice.co.uk/app

LOtC Quality Badge www.lotcqualitybadge.org.uk

**Council for Learning
Outside the Classroom** www.clotc.org.uk

**Foreign & Commonwealth
Development Office** www.fco.gov.uk

EXTERNAL TRAINING COURSES (delivered by EVOLVE Advice)

EVC, Visit Leader, Visit Emergencies, & EVOLVE Training - see www.evccourses.co.uk

Appendix E

Simple Process to follow using the Policy for Guidance and greater support

1st - Choose a trip (class, whole school, sporting event, selected pupils)

2nd - Confirm with the Headteacher it could be viable.

3rd - Look at the category of the trip below

Type of Trip	Approval Needed by	Evolve RA needed	Completed on Evolve
Local Learning Area Charnwood College, walk to church, walk to the hut, the nursery.	EVC Headteacher	Record on Evolve local area module. The generic RA if already made should be used for this.	Yes
Adventurous activities Rock climbing, high ropes, shooting, archery	EVC TRUST approval at least 1 month before visit. Headteacher approval after Trust approval is gained.	Yes	Yes
Residential An overnight stay	EVC TRUST approval at least 1 month before visit. Headteacher approval after Trust approval is gained.	Yes	Yes
Day Visits Farm visit, library, walking in a park, swimming lessons	EVC Headteacher	Yes	Yes
Local Sports Fixtures Within 20 miles away (See sports fixtures policy)	EVC Headteacher	Record on Evolve local area module. The generic RA if already made should be used for this.	Yes
Sports Fixtures Away Tournaments, anything further than 20 miles away (See sports fixtures policy)	EVC Headteacher	Yes	Yes

4th – Complete a finance planning form (Admin assist will have this) to ensure the costs are viable.

5th – Gain approval from the Headteacher the costs are viable

6th – Provisionally book coach and event.

7th - Start completing the Evolve form and all RA involved to ensure all aspects have been considered (Staffing, SEND and medical needs). Follow the policy above, paying particular attention to external providers and RA that are needed etc

8th - Send out a letter to parents to ensure there is interest, consent and costs can be covered by parents and PPG.

9th – Before the visit takes place you must:

- Ensure you have FULL approval as required in advance of at least 2 weeks before the trip
- You have consent from all parents
- You have all pupils contact and medical details
- You know where to access the pupils' medical bags to take them with you
- You have completed the Visit Leads and the Home Contacts Emergency card and given them to the designated persons

10th – Have fun while learning!